Model 8690

Session Initiation Protocol Mode

User Guide

Notice

This Inter-Tel® user guide is released by Inter-Tel, Inc. as a guide for end-users. It provides information necessary to use the Model 8690 endpoint. The contents of this user guide, which reflect current Inter-Tel standards, are subject to revision or change without notice. Some features or applications mentioned may require a future release and are not available in the initial release. Future product features and applications are subject to availability and cost. Some features or applications may require additional hardware and/or specific software.

Some system features can only be accessed by an administrator. For information about these features, see the Frequently Asked Questions section on page 111.

For sales, service, or technical support, contact your local authorized Inter-Tel provider.

Comments about this user guide or other technical documentation should be directed to Inter-Tel's Technical Publications Department at: Tech_Pubs@inter-tel.com

All products and services mentioned in this publication are the trademarks, service marks, registered marks, or registered service marks of their respective owners.

Inter-Tel®, Axxess®, Enterprise®, Unified Communicator®, and CommSource® are registered trademarks of Inter-Tel, Incorporated.

Microsoft®, Windows®, ActiveSync®, and Outlook® are registered trademarks of Microsoft Corporation.

PRODUCT DISPOSAL INSTRUCTIONS

This symbol indicates that the product is classified as electrical or electronic equipment and should not be disposed of with other commercial or household waste at the end of its working life. For appropriate disposal and recycling instructions, contact your local recycling authority or Inter-Tel provider.

The Waste of Electrical and Electronic Equipment (WEEE) Directive (2002/96/EC) was established by the European Union to minimize negative impact on the environment, control hazardous substances, and curtail landfill expansion by using the best available recovery and recycling techniques.

Table of Contents

CONTENTS *PAGE*

FINDING YOUR WAY 1

Welcome. 2
About This Guide 2
About Your Endpoint 3
Telephone Interface. 7
About the Operating System 12
About SIP Mode. 15
About Voice Mail 15
What You See and Hear 19
Software Compatibility 20
Guidelines for Using the Model 8690 Endpoint 21
Endpoint Basics 22
Setting Up Voice Mail 24
Accessing Your Mailbox. 27
Disabling and Enabling ASR 28

GETTING STARTED 29

Introduction 30
Calibrating the Screen 30
Setting Backlight Options 31
Configuring VLAN Ports. 32
Using the System Tray Menu 33
Installing Software and Firmware Upgrades 40
Making and Receiving Calls. 43
Placing Calls On Hold. 46
Placing Conference Calls. 46
Transferring Calls 47
Using Reverse Transfer 48
Forwarding Calls. 48
Redialing a Number 49
Accessing Voice Mail Messages 50
Using Do-Not-Disturb Mode. 55

©Inter-Tel, Inc. March 2006 printed in US

CONTENTS PAGE

MOVING ON 57
Introduction 58
Setting Endpoint Preferences 58
Setting Mailbox Preferences 60
Screening Calls 66
Using the Voice Mail Directory 67
USING UC 69
Introduction 70
Logging On and Off of UC 70
Using UC Views 71
Unified Communicator View 72
Messages View 78
Call List View 79
Call Log View 83
Address Book View 87
Call Routing View 93
USING E-MAIL READER 95
Introduction 96
E-Mail Reader Features 97
Using Your Advanced Mailbox 98
Setting Up Your E-Mail Password 99
Accessing E-Mail Messages 101
Using Main Menu E-Mail Reader Count 103
Accessing Fax Messages 104
Recovering Deleted Messages 105
Changing Message Envelopes 106
Voice Mail Flowchart (Advanced Mailbox) 107
LEARNING MORE 109
Introduction 110
What the Administrators Can Do for You 110
Frequently Asked Questions (FAQs) 111
Default Feature Codes 114
INDEX 117

Finding Your Way

SECTION CONTENTS PAGE

Welcome **2**
About This Guide **2**
About Your Endpoint **3**
Endpoint Connectors 4
Optional USB Devices 5
Message Indicator Lamp 5
Reset Button 6
Power Requirements 6
Telephone Interface **7**
Feature Buttons 8
Display and Menu 9
Unified Communicator Elements 10
Interface Skins 11
About the Operating System **12**
Input Panel 13
System Memory and Storage 13
System Registry 14
Operating System Help 14
About SIP Mode **15**
About Voice Mail **15**
Enterprise Messaging 17
Automatic Speech Recognition (ASR) 18
What You See and Hear **19**
Software Compatibility **20**
Guidelines for Using the Model 8690 Endpoint **21**
Endpoint Basics **22**
Adjusting Your Endpoint's Viewing Angle 22
Using the Speaker and Microphone 22
Using the Message Button 23
Using a Headset 23
Setting Up Voice Mail **24**
Initializing Your Mailbox 24
Recording Your Personal Greetings 25
Recording Your Voice Mail Directory Name 26
Accessing Your Mailbox **27**
Disabling and Enabling ASR **28**

WELCOME

Your new Model 8690 endpoint provides access to several features, each of which is described in this guide. The Inter-Tel multi-protocol endpoints support two different modes of network protocols, and can operate in either Inter-Tel Protocol (ITP) mode or Session Initiation Protocol (SIP) mode. The operating mode determines which features and options are enabled on the endpoint. This guide is for the Model 8690 endpoint operating in SIP mode. If your endpoint is configured to operate in ITP mode, request a copy of the *Model 8690 User Guide: Inter-Tel Protocol Mode* (part number 550.8116) from your system administrator.

The *About This Guide* section below lists the different sections in this user guide and describes the type of information you can find there.

ABOUT THIS GUIDE

This guide contains instructions for using the Model 8690 endpoint on the Inter-Tel® telephone system. To help you find information more quickly, this guide is divided into six separate sections, as indicated by the tabs. These sections include the following:

- **Finding Your Way:** This section provides you with a picture of the Model 8690 endpoint and includes general information designed to help you find what you need.
- **Getting Started:** This section includes basic endpoint and voice mail information, and provides instructions on how to perform everyday tasks, such as answering calls, making calls, and using voice mail.
- **Moving On:** In this section you'll learn how to use advanced endpoint and voice mail features.
- **Using UC:** This section includes information on how to use the advanced communication features available with Unified Communicator ®(UC).
- **Using E-Mail Reader:** This section includes information on how to use the advanced messaging features available with E-Mail Reader.
- **Learning More:** This section outlines how your administrators can help if you experience a problem with your endpoint. It also provides you with a list of Frequently Asked Questions (FAQs) so you can troubleshoot problems and learn more about the system.

In addition, this guide contains a list of default feature codes (see page 114) and an index (see page 117) for easy reference.

NOTE: Because the telephone system is very flexible and programmable, the procedures for using the features might vary slightly from the descriptions in this guide. If so, your trainer or system administrator can tell you how your system differs and how to use the features.

About Your Endpoint

Your Model 8690 is a desktop endpoint that uses the technology available with a Personal Data Assistant (PDA). The operating system on the endpoint is a customized version of Microsoft® Windows® CE .NET 4.2. The Model 8690 has a Liquid Crystal Display (LCD) touch screen that displays a telephone interface with traditional telephone elements that include a display, dialpad, feature buttons, and menu buttons. A stylus pen provides access to elements on the interface.

Additional endpoint features include:

- **Headset Jack:** Connects to a headset.
- **Handset Jack:** Connects to a handset.
- **Two Speakers:** Provide audio output.
- **Message Indicator Lamp:** Flashes when you have a waiting message.
- **Built-In High Fidelity Microphone:** Allows you to use the endpoint handsfree.
- **Hearing Aid-Compatible (HAC) Handset:** Allows you to make and receive calls privately.

NOTE: The Model 8690 is not designed to be wall mounted.

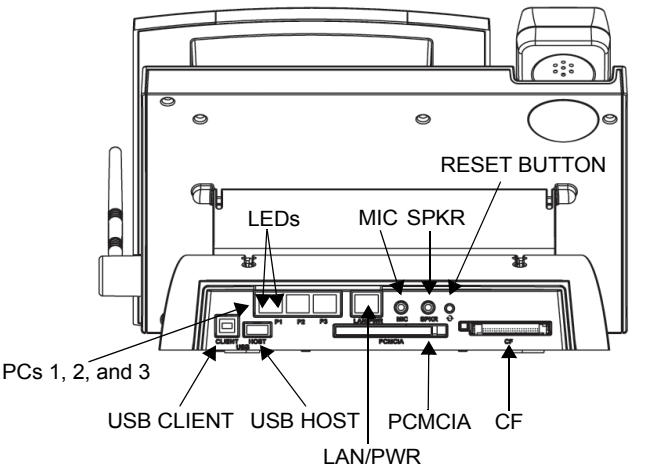
Endpoint Connectors

Your Model 8690 endpoint has various connectors that are required for an IP endpoint. Two light-emitting diodes (LEDs) on the PC ports and LAN/Power jack indicate link status and the speed of the connections.

The ports and connectors on the Model 8690 endpoint include the following:

- **External Microphone Jack:** Allows you to connect an external microphone to the endpoint.
- **External Speaker Jack:** Allows you to connect an external speaker to the endpoint.
- **Reset Button:** If your endpoint is equipped with a reset button, it allows your administrator to restore default settings (see page 6 for details).
- **Compact Flash (CF) Port:** Allows you to connect a CF memory card if additional memory is needed.
- **Personal Computer Memory Card International Association (PCMCIA) Port:** Allows you to connect a PCMCIA memory card if additional memory is needed.
- **LAN/PWR Jack:** Connects the endpoint to a network hub/switch and the power supply.
- **Universal Serial Bus (USB) Client Port:** Connects the endpoint to a host computer running ActiveSync®.
- **USB Host Port:** Allows you to connect a keyboard, mouse, or other USB device to your endpoint.
- **Three PC Ports:** Allows you to connect your PC or any other 10/100 Ethernet device to your endpoint.

Back



Optional USB Devices

You can connect a standard USB device to your Model 8690 endpoint using a standard USB cable (not included) connected to the USB host port on the back of the endpoint (see page 4). The operating system will automatically detect the device when the endpoint is powered on.

If you connect a USB keyboard, you can configure the keyboard properties under Start - Settings - Control Panel - **Keyboard**. You can also use the USB host port to connect a mouse. You can configure mouse properties under Start - Settings - Control Panel - **Mouse**.

If you would like to connect both a mouse and a keyboard to the endpoint, you will need to use two USB cables. First connect the mouse to the keyboard and then connect the keyboard to the USB host port on the endpoint. The operating system recognizes all daisy-chained USB devices.

Message Indicator Lamp

The Message Indicator lamp (located at the top, right corner of the endpoint) flashes whenever there is one or more waiting messages. In addition, the display indicates the number of messages you have waiting. See page 23 for instructions on retrieving messages.

NOTE: By default, the message lamp is programmed to light when you receive a new voice mail message. However, this lamp can be programmed for other functions. Check with your system administrator if you are unsure what your endpoint's lamp is programmed to indicate.

If desired, you can program the endpoint so that the message lamp does not flash, even when new messages are waiting. For details, see page see (see page 34).

Reset Button

If your endpoint is equipped with a reset button on the back, pressing it immediately shuts down the operating system and any applications that are currently running on the endpoint, the screen goes blank, and the default settings are restored. After a few moments the operating system restarts and the client application re-opens when network connectivity is re-established.

CAUTION

Do not press the Reset button on your endpoint unless you are told to do so by your system or network administrator. Desktop shortcuts and any preferences that have not been saved in the registry are lost when you press the Reset button. In addition, the endpoint will require additional programming to restore it to its previous operational state.

Power Requirements

The Model 8690 should remain powered on at all times. The endpoint receives power from an individual power supply unit. It is important to use a power supply unit that is compatible with the endpoint. The Inter-Tel Universal Power Supply (part number 806.1119) is compatible with the Model 8690 endpoint and is available through Inter-Tel's CommSource® division.

It is recommended that you plug your endpoint's power supply unit into an Uninterruptible Power Supply (UPS). If your endpoint's power supply unit is not plugged into a UPS and the power fails, the current call will be dropped.

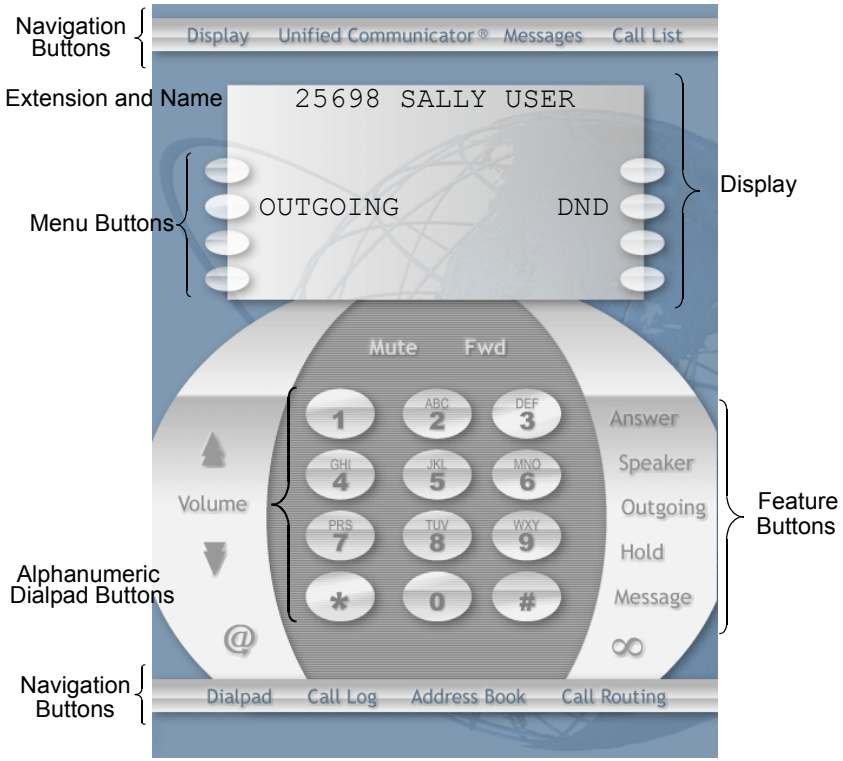
NOTE: Contact your network administrator to order a new power supply unit for your endpoint.

Your system may be configured to use a centralized power source (power over Ethernet) as a backup power source. Your network administrator will explain how to connect your endpoint to the centralized power source. If your power supply unit fails and your system is running power over Ethernet, you will be able to use the audio portion only of the endpoint. Power over Ethernet does not support the display portion of the endpoint.

TELEPHONE INTERFACE

The Model 8690 user interface contains elements that simulate a traditional Inter-Tel six-line display endpoint. These elements allow you to place and receive calls and access telephone and voice mail features from the Model 8690 just like a conventional Inter-Tel endpoint. The interface includes the following elements:

- **Navigation buttons:** Provide access to UC views (see page 10).
- **Six-line display:** Provides extension and system information and a menu for accessing additional options or features.
- **Menu buttons:** Allow you to scroll through options and make selections based on the active feature.
- **Dialpad buttons:** Allow you to enter numbers and letters.
- **Feature buttons:** Provide quick access to various telephone and voice mail features.



NOTE: The instructions throughout this user guide assume that you are using the stylus with the endpoint. When you are instructed to “press” an area on the screen, gently tap the appropriate area of the touch screen with the stylus.

Feature Buttons

The feature buttons are designed to automate some of the commonly-used functions, such as dialing an outside number. Each of these is described in the table below.

BUTTON	IF YOU...	YOU CAN...	PG.
Mute	Press **Mute**	Mute the microphone.	22
Fwd	Press **Fwd**	Forward your calls.	48
Answer	Press **Answer**	Answer a call.	45
Speaker	Press **Speaker**	Put a call on the speaker.	22
Outgoing	Press **Outgoing** and dial the number	Place an outgoing call.	44
Hold	Press **Hold**	Put a call on hold.	46
Message	Press **Message**	Listen to a message.	23
Volume Up Volume Down	Press the **Up** or **Down Volume** arrow	Adjust volume during a call.	58
Auto Dial	Press the Auto Dial button (@)	Enable/disable the UC auto dial feature.	35

In addition to the buttons identified in the preceding table, your endpoint has a Special button (∞). Depending on how your telephone system is configured, you may need to press this button before you dial a feature code. Consult your system administrator if you have questions about how your system is configured.

Display and Menu

The six-line display area of the interface provides basic system information as well as a menu to access more advanced endpoint features. The first line of the display contains the extension and name of the user. The lower four lines of the display contain menu options that change according to the feature that you are currently using. To select an option on the menu, press the menu button closest to it. If there is only one option on a line, you can press the button on either side. (You can also select the text in the display.)

Because the menu display can only support 16 characters, you may see a few abbreviations. The most commonly used abbreviations are provided in the table below

ABBREVIATION	WORD/PHRASE
CNF	Conference
DEST	Destination
DND	Do-Not-Disturb
EXT	Extension
MSG	Message
RCL	Recall
TFR	Transfer

Unified Communicator Elements

Unified Communicator (UC) is a productivity tool designed to help you manage your communication effectively. UC allows you to interact with the software through personal computers, desktop endpoints, cell phones, handheld organizers, and speech. With multiple interfaces, you can access features and functionality, no matter where you are.

The UC elements on the telephone interface consist of the system tray icon in the system tray and the navigation buttons on the telephone interface. Information about these elements appears below. For instructions on how to use UC features and options on your endpoint, see page 69.

System Tray Icon

When the client application is running, the system tray icon appears in the Windows® system tray. The system tray is located in the lower-right portion of the taskbar near the clock. If you press the icon, the system tray menu is displayed. For menu options and instructions, see page 30.

The system tray icon represents the current UC status as one of the following:

You are not currently logged on to UC.

You are currently logged on to UC and your status is available.

You are currently logged on to UC and your status is unavailable.

Navigation Buttons

The navigation buttons on the interface provide access to UC views. Pressing a navigation button highlights the button and displays the associated view. Pressing the button again closes the view. At any time, you can press the **Display** or **Dialpad** navigation buttons to return to the display or dialpad.

- Unified Communicator: Provides access to advanced UC features (see page 69).
- Messages: Displays a list of various messages (see page 78).
- Call List: Displays a list of your current calls (see page 79).
- Call Log: Allows you to view a history of your recent calls (see page 83).
- Address Book: Allows you to store and manage contact information (see page 87).
- Call Routing: Allows you to enable and disable call routing rules (see page 93).

NOTE: The names for the navigation buttons may vary slightly depending on the skin that you are using. The instructions in this user guide assume you are using the default skin (Globe).

Interface Skins

You can customize your endpoint's appearance by selecting a "skin" and applying it to the interface. All skin options include navigation buttons, a display, a dialpad, and feature buttons. Skin options for the interface are shown below.

Facets

Retro

Globe
(Default Skin)

Heavy Metal

Flower Power

To select an interface skin:

1. Press the system tray icon (see page 10), then select **Options** from the menu. The Options dialog box opens to the Session tab.
2. Press the **Appearance** tab, then enable the **Specify alternate appearance** option.
3. Press **Browse** to navigate to the program folder where the desired skin is stored, and select the skin specification file. (The specification file has an `.xml` file extension.)
4. Press **OK**.

ABOUT THE OPERATING SYSTEM

The operating system on the Model 8690 is a customized version of Microsoft Windows CE .NET v4.2. When you first power up your endpoint, the screen remains blank for approximately 10 seconds. After this period, the Windows CE .NET desktop appears, followed by the Loading Application Appearance dialog box. This dialog box signals that the telephone application is launching. Once it has launched, the telephone interface (see page 7) covers the entire desktop except the taskbar.

To minimize the telephone interface and access the desktop area of the screen, press the telephone icon or the Show Desktop icon located on the taskbar as shown below. When you minimize the interface, you have access to the desktop. To restore the interface, press either icon again.

The version of Windows CE .NET running on the Model 8690 has been customized specifically for the endpoint. This version is different from Windows PC operating systems and Windows handheld/mobile device operating systems. When using Windows CE .NET, you may notice the following differences:

- The Windows Viewer applications that are included in the operating system do not have the full functionality that their counterparts do on Windows PC operating systems. These applications include Word, Excel, PowerPoint, Media Player, and Internet Explorer.
- A range of applications, tools, and functionality normally included in PC operating systems, such as Microsoft Outlook®, administrator tools, fonts, etc., are not included with Windows CE .NET.
- Some applications will not work with Windows CE .NET. Before running an application, make sure it is compatible with Windows CE .NET.
- Because Windows CE .NET has limited RAM available for executing programs, you may experience much slower processing times than you are accustomed to on your desktop PC.

Input Panel

The operating system includes an on-screen keyboard function called the Input Panel. When a feature requires you to enter characters, the Input Panel pops to the front of the screen. To access the Input Panel, press the Input Panel icon ( ) located in the far-right corner of the taskbar. Then select **LargeKB** (large keyboard). You can relocate the Input Panel by pressing the title bar with the stylus and dragging it to another area of the screen. To hide the Input Panel, press the Input Panel icon and then press **Hide Input Panel**.

If you connect an external keyboard to your endpoint (see page 5), it is recommended that you disable the Input Panel.

To disable the Input Panel:

1. Press Start - Settings - **Control Panel**.
2. Double-press **Input Panel**.
3. Disable the **Allow applications to change the Input Panel state** option.
4. Press **OK**.
5. Save the registry (see page 14) and reset your endpoint.

System Memory and Storage

The Model 8690 ships with 128 MB of RAM and 64 MB of flash RAM. The telephone application is pre-loaded on the device, and you have approximately 5 MB of RAM available for use.

CAUTION

The Model 8690 does not have a built-in hard drive. **Storage memory will not survive a reset or an upgrade to the operating system unless the files are stored in the Mounted Volume folder on the endpoint (My Computer\Mounted Volume) or on a host that is accessible from the Model 8690.** Desktop shortcuts and any preferences that have not been saved in the registry (including UC preferences) will be lost if you upgrade the operating system or if the endpoint resets.

You can view the available amount of system memory using the System Properties dialog box. System memory is divided into Storage Memory (see caution above) and Program Memory. Program Memory is used for executing programs.

To view system memory:

1. Press Start - Settings - **Control Panel**.
2. Double-press **System**.
3. Select the Memory tab.

NOTE: While using the Memory tab, you can re-assign the system memory. Check with your network administrator before adjusting this.

System Registry

The information stored in the Windows CE .NET registry is not accessible. The registry contains a number of settings and preferences that are saved in two separate locations for backup purposes.

To safeguard registry settings, it is recommended that you save the registry after you make changes to operating system preferences using the Control Panel, and to UC preferences using the system tray menu. If the endpoint loses power during a registry update, the registry will be destroyed. However, the last saved version of the registry can be recovered upon reboot.

Saving the registry takes approximately 60 seconds to complete. To avoid locking up the endpoint, do not make additional changes to your preferences until the "Registry Saved Successfully" dialog box is displayed.

NOTE: Normally, the endpoint should remain powered on at all times. If your system or network administrator tells you to power off your endpoint, it is recommended that you save the registry first.

To save registry settings:

1. Press Start - Programs - **Save Registry**.
2. Press **Yes** to save registry settings.

When the "Registry Saved Successfully" message appears, press **OK**.

Operating System Help

A help file is provided with the Windows CE .NET operating system and can be accessed under the Start menu. The information in this file is provided by Microsoft and is limited to Windows CE .NET and the viewer applications that come with the operating system. Because the operating system has been customized, some of the information provided in this file may not apply to your endpoint. See page 39 for more information about accessing the help files created specifically for the endpoint and UC.

About SIP Mode

Your endpoint allows you to communicate with other devices on your network using a text-based standards protocol called Session Initiation Protocol (SIP). SIP is used for initiating interactive communication sessions, which includes establishing, maintaining, and terminating calls between two or more network endpoints (digital endpoints, wireless endpoints, SIP-enabled computer applications, etc.).

The Inter-Tel telephone system supports all of the Inter-Tel SIP-enabled devices and applications including UC v2.1 and later. UC is fully integrated with the telephone and voice mail systems to provide you with a variety of advanced endpoint features. When you use UC with your SIP-enabled endpoint, you receive a combination of mobility, flexibility, and advanced communication features. For more information about Unified Communicator, see the latest version of the *Unified Communicator User Guide*.

About Voice Mail

Voice mail is an application that is part of the Inter-Tel voice processing system. Using voice mail, you and other callers can send and receive recorded messages from any supported endpoint on the system. To use voice mail features, each user (or subscriber) is assigned a mailbox, which usually corresponds to the extension number assigned to your endpoint. You can, however, have an unassociated mailbox that does not correspond to an extension. (Unassociated mailboxes are typically used for agents or other personnel who don't have a permanent office.)

With your mailbox, you can use personal or system greetings to let callers know if you are out of town, on a call, etc. If a caller reaches your mailbox, they can leave a message, hang up, or access an attendant. In addition, if your voice mail administrator sets up one or more "group lists" of mailboxes, you can send a message to a group of people by entering one number instead of everyone's individual mailbox number.

Inter-Tel voice mail systems support the following types of mailboxes:

- **Advanced Mailbox:** If E-Mail Reader is enabled for your mailbox, you have access to voice mail, e-mail, and fax messages in your mailbox. You can also customize your personal mailbox options, and access advanced messaging features. See page 95 for information and instructions about using E-Mail Reader features. For a voice mail flowchart for advanced mailbox users, see page 107.
- **Standard Voice Mailbox:** This type of mailbox allows you to send and receive voice mail messages, record personal greetings, and allows you to customize personal mailbox options. A standard voice mailbox does not allow you to access e-mail and fax messages. For a voice mail flowchart for standard mailbox users, see page 123.

NOTE: If you have the Enterprise® Messaging (EM) voice mail system, you also have access to advanced communication and messaging features such as E-Mail Reader and Automatic Speech Recognition (ARS). For more information about EM, see page 17.

The instructions for many voice mail tasks are identical for standard voice mailbox and advanced mailbox users. The instructions for the following common mailbox tasks are included in this section as well as the *Getting Started* and *Moving On* sections of this guide:

- Initializing your mailbox (see page 24)
- Recording your personal greetings (see page 25)
- Recording your voice mail directory name (see page 26)
- Accessing your mailbox (see page 27)
- Disabling and enabling ASR (see page 28)
- Accessing voice mail messages (see page 50)
- Recording and sending voice mail messages (see page 53)
- Canceling unheard voice mail messages (see page 55)
- Changing your mailbox password (see page 60)
- Changing the call screening transfer method (see page 62)
- Programming a fax destination (see page 63)
- Changing the message search order (see page 63)
- Programming remote messaging (see page 64)
- Screening calls (see page 66)
- Using the voice mail directory (see page 67)

NOTE: Voice mail displays are not supported in SIP mode, however audio prompts are supported.

Enterprise Messaging

Enterprise Messaging (EM) is the Inter-Tel messaging system that uses industry-standard protocols for communication and messaging. EM unifies communication and messaging by providing access to voice mail, fax, and e-mail messages in your mailbox. The EM system provides voice mail users with the following advanced messaging features:

- **Automatic Speech Recognition (ASR):** ASR can be enabled for the entire system or it can be enabled for specific applications (like voice mail) or mailboxes. When ASR is enabled for your mailbox, you can issue spoken commands to navigate the voice mail menus. ASR also allows subscribers and non-subscribers to navigate automated attendant menus, call routing applications, and search the directories. ASR can be enabled for standard voice mailboxes and advanced mailboxes (see page 16). For more information about ASR, see page 18.
- **E-Mail Reader:** E-Mail Reader allows you to access voice, e-mail, and fax messages from your mailbox. For e-mail messages, E-mail Reader uses Text-to-Speech (TTS) capabilities included with EM to convert the text in an e-mail message to a **`.wav`** file. For fax messages, E-Mail Reader announces the fax envelope. If E-Mail Reader has been enabled for your mailbox, your voice mail, e-mail, and fax messages are unified in one convenient location. For more information and instructions about how to use E-Mail Reader features, see the *Using E-Mail Reader* section, starting on page 95.

Consult your voice mail administrator to see if ASR and/or E-Mail Reader is enabled for your mailbox.

NOTE: EM also includes Unified Messaging inbound and outbound faxing capabilities. For information and instructions about Unified Messaging features, see Issue 2.3 of the *Unified Messaging User Guide*, part number 550.8121.

Automatic Speech Recognition (ASR)

Automatic Speech Recognition (ASR) is a feature available for systems using EM. Because ASR is a very flexible feature, it can be enabled or disabled on several different levels. When ASR is enabled for your mailbox, you can issue spoken commands to navigate the voice mail menus. ASR also allows subscribers and non-subscribers to navigate automated attendant menus, call routing applications, and search the directories using voice commands.

When you access voice mail, if you are given the option to say a command or press a dialpad button to complete a task, then ASR is enabled for your mailbox. If you are only prompted to press a dialpad button, ASR is not enabled for your mailbox. If your mailbox is not ASR-enabled, you can still navigate the menus and perform tasks by pressing the appropriate dialpad buttons when prompted by the system.

When using ASR, follow these guidelines for best results:

- When completing a mailbox-related task, either say the command each time or press the dialpad buttons each time.
- Use the handset when issuing spoken commands. Your endpoint's speaker can pick up background noise and other sounds, which may cause the system to misinterpret a command.
- When you use the dialpad buttons to complete a task, you are sometimes prompted to press # to indicate to the system that you have finished entering digits. It is not necessary to say "Pound" or "Hash" when using ASR. The silence that follows your voice command replaces the # digit.
- While you are recording a message, ASR is temporarily disabled, therefore you cannot issue spoken commands to access options like pause and erase. If you attempt to issue a spoken command while you are recording, your recording will include the command you issued. To access the pause and erase options, you must press the appropriate dialpad buttons.
- You cannot use ASR to set up your e-mail password (see page 99). For security reasons, you must enter your e-mail password characters by pressing the appropriate dialpad buttons. Entering passwords this way prevents others from overhearing your password.
- If the system cannot interpret your voice commands for three consecutive attempts, ASR is temporarily disabled by the system for the current call. You can still complete tasks using the dialpad buttons; however, you will no longer be prompted to say a command.
- You can temporarily disable ASR for the current call by selecting option eight from the main menu.

WHAT YOU SEE AND HEAR

Your Model 8690 endpoint and the telephone system come equipped with many features. To help you understand what everything means, it is recommended that you read the following information *before* you use your endpoint:

- The endpoint has a 640x480 pixel LCD touch screen. To access the elements on the screen, use the stylus that is shipped with the endpoint. When you are instructed to "press" an area on the screen, gently tap the appropriate area of the touch screen with the stylus.
- To "right-click" an element on the screen, press and hold the stylus on an icon. A ring of black dots appears indicating a right mouse click, and the "right-click" menu appears.
- If the endpoint remains idle for more than four hours, the backlight on the screen will time out and the screen will go dark (see page 31 to change the default backlight timeout). To "wake" the screen, either lift the handset or touch the screen. The display automatically "wakes" when you make or receive a call.
- To enter letters and numbers when using basic endpoint features, use the dialpad on the interface. To switch to alphanumeric mode from numeric mode, press **Message**. If the Message Indicator lamp is lit, you are in alphanumeric mode, which allows you to enter letters. If the Message Indicator lamp is unlit, you are in numeric mode and can only enter numbers and special characters. When entering letters and numbers, to backspace press **Mute** to backspace. To insert a forward space, press **Fwd**.
- The telephone application's audio feature has priority over the operating system's audio feature. For example, if you are running Windows Media Player to play music and your endpoint receives a call, the audio for Media Player is cut off, and audio output switches to the call. When the call ends, audio is switched back to Media Player. You can configure audio properties under Start - Settings - Control Panel - **Volume & Sounds**.
- If you hear four fast tones or repeating fast tones, you have pressed an invalid button combination, tried to select a restricted line, dialed a restricted or invalid number, dialed too slowly between digits, or waited too long before performing the next step. Hang up and try again.

NOTE: If you dial a valid extension and you hear four fast tones, the extension you dialed is in DND. If you dial a valid extension and you hear repeating fast tones, the extension is busy. You can send a message (see page 23) if the extension has an associated voice mailbox.

- Your telephone system may be programmed for one or two dial tones. Systems with two dial tones have one for intercom calls and one for outside calls.
- Many features "time out" if you wait too long before performing the next step. If this happens, you must hang up and start over.
- Off-hook" means that the handset is lifted and "on-hook" indicates that the handset is in the cradle. For example, you must first go "off-hook" to make a call, but you must go "on-hook" to end a call.

SOFTWARE COMPATIBILITY

Depending upon which software version your telephone system is using, some of the features included in this guide may not be available for your endpoint. Check with your system administrator to see which software version your telephone system currently uses and if there are any features restrictions for your system.

Your Model 8690 endpoint is compatible with the following Inter-Tel software:

- Inter-Tel® 5000 system software v1.0 and later
- Axxess® system software v8.1 and later
- Unified Communicator® v2.1 and later
- Enterprise® Messaging v1.0 and later

GUIDELINES FOR USING THE MODEL 8690 ENDPOINT

It is recommended that you read the following guidelines before using your Model 8690:

- Consult your system administrator and your local Inter-Tel servicing company for important information about dialing emergency services from your Model 8690 before you begin using it.
- There can only be one memory card (PCMCIA or CF) inserted when you power on the endpoint. If you use both types of memory cards, remove one card before powering up the endpoint.
- Generally the endpoint should remain powered on at all times. Do not power down the endpoint unless you are instructed to do so by your network administrator. If you are instructed to power down your endpoint, save the registry first (see page 14). If you do not save the registry, your preferences will be lost when you power down the endpoint.
- Consult your network administrator before setting options in the Advanced submenu (see page 37). Although you can access these options from the system tray menu, you should not use them unless your network administrator has supplied you with all of the network settings and additional information that are required.
- Periodically, the endpoint checks for software upgrades. When an upgrade is available, the Software Upgrade dialog box opens, and you are prompted to install the upgrade. **You must take certain precautions to safeguard data and preferences before performing an upgrade to the operating system.** See page 40 for important information about installing software upgrades.
- To avoid a flash memory conflict, do not make or receive calls while upgrading the operating system.
- Because the Model 8690 does **not** contain a battery, any data and/or files in storage memory that are not saved in the Mounted Volume folder will be **lost** when the device looses power.
- Because the Model 8690 has a limited storage capacity, it is recommended that you save applications and data on a host, such as a desktop PC or a memory card (see page 4) that is accessible from the endpoint. For example, using a 128 MB Compact Flash memory card significantly increases the available storage on the 8690. Any data or files saved on the memory card will be saved even if the endpoint loses power or resets.
- Before you begin using UC on your endpoint, note that some options must be changed or implemented from the UC Web Client on your PC (see page 71). You can not access the UC Web Client URL from your endpoint's browser.

For additional information about WindowsCE.NET, go to www.microsoft.com/windows/embedded/ce.net/default.asp.

ENDPOINT BASICS

Before you begin using your endpoint, take a moment to learn how to complete basic tasks such as adjusting the angle of the endpoint, using the speaker and the microphone, and using a headset.

Adjusting Your Endpoint's Viewing Angle

Your Model 8690 endpoint has an adjustable base that allows you to tilt it to enhance the viewing angle.

To adjust the viewing angle of the endpoint:

1. Position the bottom of the endpoint's base on a flat surface.
2. Tilt the endpoint to the desired angle.
3. Place the "feet" of the support mechanism in the holes on the base to secure the position of the endpoint.

Using the Speaker and Microphone

If you are not using a headset, you can talk handsfree using your speaker and microphone. The microphone has a mute feature, which, when enabled, allows you to hear the other party but they cannot hear you. (This does not put the party on hold.) You can also use the speakerphone for on-hook dialing, and the Group Listen feature.

Mute Button

To mute the microphone:

Press **Mute** or the **MUTE** menu button.

To turn the mute feature off:

Press **Mute** or the **UNMUTE** menu button.

Group Listen Using the Speaker

With the Group Listen feature, you can transmit a conversation over the speaker while you use the handset to continue speaking. This allows other people to hear the caller while the caller can only hear you.

NOTE: You cannot use this feature on a handsfree call. You must be on a call using the handset before entering the feature code.

To turn the group listen feature on or off during a call:

Press ∞ and dial 3 1 2. You hear a confirmation tone and the display shows GROUP LISTEN ON or GROUP LISTEN OFF. (The other party will not hear the confirmation tone.)

Using the Message Button

In today's busy world, it's almost guaranteed that someone will call you while you are on another call, away from your work station, or in DND. When this occurs, the other party can leave a message for you. When you have received a message from another party, your endpoint's Message Indicator lamp flashes. When you press **Message**, a call is automatically placed to the calling endpoint or voice mail system to retrieve the message.

Retrieving Messages

To retrieve a message (Message Indicator lamp is flashing):

Lift the handset and press **Message**. A call is automatically placed to the endpoint or message center that left the message. (See page 27 for information about accessing your mailbox.)

Using a Headset

With an electret headset, you can talk on the endpoint handsfree, without using your speaker and microphone.

NOTE: If your headset has a power-saver mode, make sure the system administrator has the Headset Connect Tone flag enabled in the telephone system. If this flag is *not* enabled, you may miss the first few seconds of incoming calls.

To connect a headset:

1. Insert the headset plug into the headset jack.
2. With the handset in the cradle, dial 3 1 5 (Headset On feature code) or dial 3 1 7 (Headset On/Off feature code). The display shows HEADSET MODE ON.

NOTE: If using a headset, press **Speaker** to connect and disconnect calls.

To disconnect a headset:

1. Unplug the headset cord from the headset jack.
2. With the handset in the cradle, dial 3 1 6 (Headset Off feature code) or dial 3 1 7 (Headset On/Off feature code). The display shows HEADSET MODE OFF.

NOTE: If you have both a headset and handset connected to your endpoint and you are using the headset, you can quickly transfer audio to the handset by lifting the handset from the cradle. Press **Speaker** to transfer the call back to the headset before replacing the handset in the cradle.

SETTING UP VOICE MAIL

To begin using your mailbox you will need to complete a few basic set-up procedures to initialize your mailbox, customize your personal greetings, and record your voice mail directory name. Although voice mail displays are not supported in SIP mode, audio prompts are supported.

NOTE: If your telephone system uses Enterprise Messaging (EM), your mailbox may have the Automatic Speech Recognition (ASR) feature enabled. When ASR is enabled for your mailbox, you have the option of issuing a spoken command or pressing a dialpad button. See page 18 for ASR guidelines.

ALSO: If your mailbox has E-Mail Reader enabled, you have an advanced mailbox. See page 95 for information and instructions about using E-Mail Reader features.

Initializing Your Mailbox

To access voice mail, the first thing you need to do is initialize your mailbox. This allows you to change the default password for your mailbox, record your name for the company directories, and listen to the voice mail introduction.

To initialize your mailbox:

1. Dial the voice mail extension number. (You hear the main menu.)

   NOTE: If you do not know the voice mail extension number, check with your voice mail administrator.

2. Say "Login" or press * to identify yourself as a subscriber.
3. Say or enter your mailbox number using the dialpad buttons.
4. Enter your default password using the dialpad buttons.

   NOTE: Your mailbox number is your default password.

   If you want a password, say or enter a new password using digits 0-9 (up to 12 digits). Then press #. The messaging system plays back your password.

   If you do not want to use a password, just say "Skip" or press #.

5. Say "Accept" or press # to accept the entry or say "Erase" or press 3 to re-enter your password. The system prompts you to record your directory name.

6. After the tone, record your first and last name.
7. When prompted, do one of the following:
   - Say “Accept” or press # again to accept the name.
   - Say “Replay” or press 1 to replay the name you just recorded.
   - Say “Append” or press 2 to add to your name.
   - Say “Re-record” or press 3 to erase and re-record your name.

NOTE: The system then plays a prompt that introduces you to the basic voice mail system features. You can skip this introduction by saying “Skip” or by pressing #, if desired.

Recording Your Personal Greetings

You can store two different personal greetings in your voice mailbox: a primary and an alternate. You may change or choose to use either greeting at any time. You can then select which greeting you want played when a caller reaches your voice mailbox. Because the purpose of this greeting is to tell callers why they have reached your voice mailbox, you should include the following information:

- Whether or not you are in the office and where you can be reached
- When you will be returning calls
- For callers who do not wish to leave a message, how to exit voice mail (press 0 to return to the operator)

The following are some sample greetings to help you plan your message:

- **Primary Greeting:** Hello, this is _____. I am either on another line or away from my desk and cannot take your call at this time. If you need to speak to someone immediately, please dial zero now. Otherwise, leave a detailed message, and I will return your call as soon as possible. Thank you.
- **Alternate Greeting:** Hello, this is _____. I will be away from the office from *day/date* until *day/date*. If you need to speak to someone immediately, please dial zero now. Otherwise, leave a detailed message, and I will return your call when I return. Thank you.

You can also select the **System Greeting** if you do not want to record a primary or alternate greeting. The system greeting states, “Mailbox number (xxxxx) is not available.” Depending on how your system is programmed, the system greeting may also include, “After the tone, please record your message. When finished, you may hang up to deliver the message or press pound for more options.”

To record/change your personal greeting:

1. Access your mailbox as described on page 27.
2. Say “Personal” or press 4 to select the Personal Options Menu.
3. Say “Greeting” or press 1 to record/change your personal greeting.
4. Do one of the following:
   - Say “Primary” or press 1 to record and/or enable your primary greeting.
   - Say “Alternate” or press 2 to record and/or enable your alternate greeting.
   - Say “System” or press 3 to enable the system default mailbox greeting.
5. *If you selected the system greeting option,* hang up.

   If you selected the primary or alternate greeting option, record your greeting when prompted, then press #.

   If you already have a primary or alternate greeting, it is played when you select primary or alternate.

   You can then do one of the following:
   - Say “Accept” or press # to accept the greeting.
   - Say “Replay” or press 1 to replay the greeting.
   - Say “Append” or press 2 to add to the greeting.
   - Say “Erase” or press 3 to erase and re-record the greeting.
   - Say “Cancel” or press * to exit without changing your greeting.
6. Hang up.

Recording Your Voice Mail Directory Name

Your recorded name is used to identify you in the voice mail directory and to verify your mailbox number when messages are addressed to you. Although you record your name when you first initialize your mailbox, you can change it at any time.

To record your directory name:

1. Access your mailbox as described on page 27.
2. Say “Personal” or press 4 to select the Personal Options Menu.
3. Say “Name” or press 2. Your current name is played.
4. Do one of the following:
   - Say “Accept” or press # again to accept your recorded name.
   - Say “Replay” or press 1 to replay your recorded name.
   - Say “Append” or press 2 to add to your name.
   - Say “Erase” or press 3 to erase and re-record your name. When you hear a tone, record your first and last name. Then say “Accept” or press # to accept your recorded name.
5. Hang up.

ACCESSING YOUR MAILBOX

If you have a message waiting in your mailbox, you must access your mailbox to retrieve it. Although voice mail displays are not supported in SIP mode, audio prompts are supported.

NOTE: If your telephone system uses Enterprise Messaging (EM), your mailbox may have the Automatic Speech Recognition (ASR) feature enabled. When ASR is enabled for your mailbox, you have the option of issuing a spoken command or pressing a dial-pad button. See page 18 for ASR guidelines.

ALSO: If your mailbox has E-Mail Reader enabled, you have an advanced mailbox. See page 95 for information and instructions about using E-Mail Reader features.

When you access your mailbox, depending on the voice processing system, enabled features, and mailbox status, you may hear one of the following messages:

- **Mailbox almost full or full:** If your mailbox is full, no new messages can be received until you delete waiting or saved messages.
- **Quota grace limit reached:** The quota grace limit is an EM feature. If this feature is enabled, it allows a mailbox to "overfill" beyond normal capacity. When the quota grace limit has been reached, this announcement is played.
- **Message count and type:** The system announces the number of new and/or saved messages that are in your mailbox. The system also informs you if the messages are priority messages. If E-Mail Reader is enabled for your mailbox, the media type is indicated.
- **Remote Messaging:** The system indicates if the Remote Messaging feature is enabled (see page 64). It also alerts you if a programming error has been detected when attempting to place a Remote Messaging call.

To access your mailbox:

1. Dial the voice mail extension number. (You hear the main menu.)
2. During or after the greeting, say "Login" or press * to identify yourself as a subscriber.
3. Say or enter your mailbox number.
4. Enter your mailbox password (if programmed), then press #. If you do not have a password, press # to bypass the password prompt. See page 60 for information on programming passwords.

NOTE: Generally, saying "Skip" or pressing # during any voice mail operation will advance you to the next step. For example, when leaving a voice mail message for another voice mail user, you can say "Skip" or press # to skip the person's introductory message and proceed directly to the recording phase. Similarly, while listening to messages, you can say "Skip" or press # to skip the system-generated voice prompts and proceed directly to the playback phase. Also, at any menu level, you can say "Cancel" or press * to cancel or return to the previous menu.

DISABLING AND ENABLING ASR

If your telephone system uses Enterprise Messaging (EM), your mailbox may have the Automatic Speech Recognition (ASR) feature enabled. When ASR is enabled for your mailbox, you have the option of issuing a spoken command or pressing a dialpad button.

If your environment prevents you from using ASR, you can temporarily disable it by accessing option number eight on the main subscriber menu. This option disables ASR for that particular call only.

Option number eight is used as a toggle, and you can re-enable ASR by pressing the number eight again on the main subscriber menu only. Also, if you press a dialpad button at the main subscriber menu to access mailbox functions, ASR is automatically turned off and will remain off for the rest of the call.

For ASR guidelines, see page 18.

NOTE: If your mailbox has E-Mail Reader enabled, you have an advanced mailbox. See page 98 for information and instructions about using E-Mail Reader features.

To temporarily disable ASR:

1. Access your mailbox as described on page 27.
2. Say "Disable" or press 8 to disable ASR for the call.

NOTE: To enable ASR after disabling it, press * until you are back at the main menu. Press 8 to enable ASR.

Getting Started

SECTION CONTENTS PAGE

Introduction 30
Calibrating the Screen 30
Setting Backlight Options 31
Configuring VLAN Ports 32
Using the System Tray Menu 33
Setting Options 33
Adding a .NET Passport 37
Using Advanced Options 37
Using Help 39
Installing Software and Firmware Upgrades 40
Firmware Upgrades 40
Telephone Client Application 40
Operating System 41
Installing a New Version of Software or Firmware 42
Making and Receiving Calls 43
Placing Intercom Calls 43
Placing Outside Calls 44
Placing Emergency Calls 44
Receiving Calls 45
Call Waiting 45
Placing Calls On Hold 46
Placing Conference Calls 46
Transferring Calls 47
To Another Extension 47
To Voice Mail 47
To an Outside Number 47
Using Reverse Transfer 48
Forwarding Calls 48
Manual Call Forwarding 48
Redirect Call 49
Redialing a Number 49
Accessing Voice Mail Messages 50
Listening to Messages 50
Recovering Deleted Voice Mail Messages 52
Recording and Sending Voice Mail Messages 53
Canceling Unheard Voice Mail Messages 55
Using Do-Not-Disturb Mode 55

INTRODUCTION

Now that you know what your endpoint can do, it's time to start using it. In this section, you'll learn how to make and receive calls, transfer calls, retrieve voice mail messages, and much more. Most of the features in this section do not require the endpoint to be logged on to UC. For instructions on how to use UC advanced features on your endpoint, see page 69.

For additional information about client application and operating system options and settings, see the *Model 8690 Administrator's Guide*.

CALIBRATING THE SCREEN

Before using the touch screen, it is important to calibrate it. Calibration ensures the display interprets the stylus presses accurately. These settings are stored in the Windows CE .NET registry and may need to be configured again if the registry is lost or reset.

To test and calibrate the screen:

1. Press Start - Settings - **Control Panel**.
2. Double-press **Stylus**.
3. Test your settings using the icons on the Double-Tap tab.
4. If the screen does not respond to your presses properly, press the Calibration tab.
5. Press **Recalibrate**.
6. Press and hold the stylus on the center of the target in every position on the screen.
7. Tap the screen to save the settings in the registry.
8. Press **OK**.

SETTING BACKLIGHT OPTIONS

To save power and extend the life of the display, you can set an option that will automatically shut off the display's backlight. When the endpoint remains inactive for the specified amount of time, the display automatically goes into "sleep" mode and the screen goes dark. To "wake" the screen, either lift the handset or touch the screen. An incoming call or input from an external mouse or keyboard will also "wake" the screen.

The default backlight timeout is four hours. You can select a different backlight timeout as explained below.

NOTE: UC Message alerts (see page 93) and status alerts (see page 94) do not "wake" the screen, however software upgrade prompts (see page 40) do.

To change the default value for the backlight timeout:

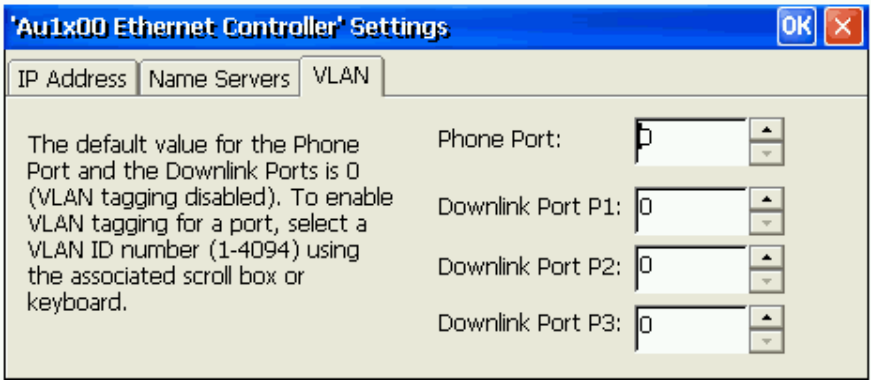
1. Press Start - Settings - **Control Panel**.
2. Double-press **Display**.
3. Select the Backlight tab.
4. Select the **Automatically turn off backlight while on external power** option.
5. Select the amount of time you want the endpoint to remain idle before the backlight turns off. Timeout choices include:
   - 1 minute
   - 2 minutes
   - 5 minutes
   - 10 minutes
   - 15 minutes
   - 30 minutes
   - 1 hour
   - 4 hours
6. Press **OK**.

CONFIGURING VLAN PORTS

To improve voice quality and security, your network administrator may place your endpoint in a Virtual Local Area Network (VLAN).

A VLAN is a network of computers that behave as if they are connected to the same wire, even though they may be physically located on different segments of a LAN. VLANs minimize congestion on the network because they allow voice and data to be routed more efficiently. If your endpoint resides on a VLAN, your network administrator may instruct you to program the VLAN ID for the ports.

NOTE: Do not configure the VLAN ID for your endpoint unless instructed to do so by your network administrator.



To configure VLAN IDs for the ports:

1. Press Start - Settings - **Control Panel**.
2. Double-press **Network and Dial-up Connections**.
3. Double-press **AUMAC1**. The 'AU1x00 Ethernet Controller' Settings dialog box opens as shown above.
4. Select the VLAN tab.
5. Select the VLAN ID number (supplied by your network administrator) for the Phone Port and the Downlink Ports using the associated scroll buttons.
6. Press **OK**.
7. Save the registry (see page 14).

USING THE SYSTEM TRAY MENU

To access the system tray menu, press the system tray icon (see page 10) to display the menu. Menu-accessible options are discussed throughout this section.

Setting Options

The system tray menu provides access to the Options dialog box, which allows you to set options for your client application. The Options dialog box contains the Session, Appearance, Behavior, Advanced and About tabs. These tabs have options you can set and information about the endpoint.

The following instructions explain how to set the available options in the Options dialog box. Some of these settings require information you must obtain from your network administrator. To open the Options dialog box, press the system tray icon, then select **Options** from the menu. The Options dialog box opens to the Session tab.

Session Tab

To set or edit options on the Session tab:

1. Enter the **Web Address** that you use to access UC.
2. Enter your account **Username**. (This is the same username that you use to log on to UC on your desktop PC.)
3. Enter your account **Password**. (This is the same password that you use to log on to UC on your desktop PC.)
4. Enable the **Automatically log on** option if you would like UC to launch without having to enter the Web address, username, and password information.

   If this option is enabled, the application will not prompt you for Web address, username and password information, unless you have not already provided it or the logon fails.

   NOTE: Enabling the **Automatically log on** option will not automatically launch UC. See page 70 for instructions on how to log on to UC.

5. Press **OK** in the upper-right corner of the Options dialog box or select another tab to edit.

   NOTE: Check with your network administrator before changing these fields.

Appearances Tab

To set or edit options on the Appearance tab:

1. Select **Specify alternate appearance** to change the default skin (see page 11).
2. Select the UC functions where you would like to use large icons. You may want to use large icons so that screen items are easier to read. However, less information will be displayed. Options include:
   - Search Results (see page 73)
   - Messages (see page 78)
   - Call List (see page 79)
   - Call Log (see page 83)
   - Address Book (see page 87)
   - Call Routing (see page 93)
3. Press **OK** in the upper-right corner of the Options dialog box or select another tab to edit.

Behavior Tab

To set or edit options on the Behavior tab:

1. If desired, change the endpoint's ring from the default:
   a. Enable **Specify custom ring**.
   b. Press **Browse** to navigate to the folder where **`.wav`** files are stored. Select from a list of **`.wav`** files you want to use. The **`.wav`** files must be in the following format: PCM 11.025 kHz, 8 Bit, Mono.
   c. Press **OK**.
2. Enable or disable the option for the client application to be displayed using the **Display window when** field. Select from the following options:
   - Phone goes off-hook (when you lift the handset or press **Speaker**)
   - Incoming call received (when your endpoint receives a call)
3. Enable or disable the option to display alert messages using the **Show alerts when** field. An "alert" is a system tray popup window that draws your attention to specific events. Select from the following options:
   - I receive a new message
   - The status of a contact in my speed-dial list changes
   - I receive a new call

   NOTE: Alerts are only shown when you are logged on to UC.
4. Enable or disable the **Flash message lamp for new messages** option.
5. Press **OK** in the upper-right corner of the Options dialog box or select another tab to edit.

Advanced Tab

To set or edit options on the Advanced tab:

1. Enable or disable the **Auto Dial** option. If you enable this option, you must provide a telephone number. When Auto Dial is enabled the **@** symbol is highlighted. Pressing the **@** symbol quickly enables/disables the Auto Dial option. When Auto Dial is enabled, picking up the handset dials the number you chose for the Auto Dial option.

   NOTE: Typically, you would enter the extension of the Unified Communicator telephone client (or an attendant) in this field. When the telephone auto dials the UC telephone client, you can use the UC Voice User Interface (VUI) to issue voice commands such as, "Call Bob Smith" to make calls. Check with your network administrator to obtain your system's telephone client number. You must enable the auto-logon option (using the Web Client - My Account link - Advanced tab options) to use the Auto Dial option to dial the Unified Communicator telephone client.

2. Enter the number for the **Backup Number** option.

   NOTE: This field allows you to specify a backup telephone number that the endpoint will automatically dial when you go off hook if the Windows CE .NET subsystem is down. Typically, you would enter a telephone number (such as the attendant's) in this field. If "0" is not the number you use to reach an attendant or operator, then provide the number here. Check with your network administrator to obtain your system's backup number.

3. Enter the maximum amount of disk space in KB that you want to allocate for endpoint diagnostic files on the Windows CE .NET subsystem. By default, this is 200 KB, but is limited by the amount of available RAM on the endpoint.

   NOTE: Check with your network administrator before changing this field. If this field value is set too high, the endpoint may run out of available memory.

4. Enable or disable the following options:
   - **Log to file**: Diagnostics are logged to a file stored in the My Computer folder on the endpoint. This option is ON by default.

     NOTE: This file is stored in an area of the file system that will be lost if you reset the endpoint. If you are asked to provide this file to technical support, either copy the file off of the device, or copy the file to the Mounted Volume folder (My Computer\Mounted Volume) before resetting the endpoint.

   - **Log to telephone system**: Diagnostics are logged to a location on the system. This option is OFF by default.
   - **Log extended information**: Additional diagnostic information is logged. This option is usually only enabled when a network administrator needs to troubleshoot endpoint issues. Enabling this option may affect client application performance.

     NOTE: Check with your network administrator before changing these fields.

5. Press **OK** in the upper-right corner of the Options dialog box to save and apply your selections.

About Tab

The About tab contains read-only and copyright information about your endpoint. This information includes:

- Model number (Model 8690)
- User Interface Version
- Firmware Version
- Operating System Version

Adding a .NET Passport

NOTE: This option is only available when you are logged on to UC.

Microsoft Passport is a "universal login" service that allows users to log in to many Web sites using one account. Working with .NET Messenger service, passport holders can also send messages online or through the telephone system if it is configured to handle calls from this type of endpoint. Ask your network administrator if your telephone system is configured to handle .NET Messenger calls.

NOTICE

At the time of this publication, Microsoft had disabled connectivity to the MSN network for third-party products like Unified Communicator, in preparation for a licensing model which had not yet been disclosed. Currently, the .NET Passport dialog box allows you to enter information, but the **functionality has been disabled**. When Inter-Tel is able to determine licensing requirements (if any) and how that will affect the future functionality of this product, the documentation will be updated accordingly.

To add passport information:

1. Press the system tray icon, then select **Passport from the menu**.
2. Enter your .NET passport **Username** and **Password** in the fields provided.
3. Enable **Handle passport calls**.
4. Press **OK**.

Using Advanced Options

This section details how to use the advanced options available on your client application. Instructions for advanced options are located in the *Model 8690 Administrator's Guide* (part no. 550.8120) and the *IP Devices Installation Manual* (835.2195). It is strongly recommended that you check with your network administrator before using advanced options.

CAUTION

Consult your network administrator before setting options on the Advanced submenu. Although you can access these options from the system tray menu, you should not use them unless your network administrator has supplied you with all of the network settings and additional information that are required.

Auto Upgrade and Pending Upgrades

Although your endpoint automatically checks for upgrades, you can run the Auto Upgrade feature using the Advanced option on the system tray menu. If there are no new upgrades available, you will not be notified, and your endpoint will function normally. If there is an upgrade available, the Software Upgrade dialog box opens, and you are prompted to install the upgrade. You can choose to install the upgrade immediately by pressing **OK** or set a reminder to install it later (see page 42).

To run the Auto Upgrade feature:

1. Press the system tray icon, then select Advanced – Auto Upgrade – **Check for New Versions**. The upgrade search dialog box opens.
2. Press **OK** to allow the system to search for software upgrades. You are not informed if upgrades are *not* available.

In addition to running the Auto Upgrade feature, you can view, install, or cancel pending upgrades using the Advanced options.

To view and install pending upgrades:

1. Press the system tray icon, then select Advanced – Auto Upgrade – **Pending Upgrades**. The Pending Upgrades dialog box opens and displays the status for the following:
   - Firmware
   - Phone Application
   - Operating System

   NOTE: The **Upgrade Now** option indicates a pending software upgrade.

2. Press **Upgrade Now** next to the upgrade you want to install. There is one button for each upgrade type.
3. When the Software Upgrade dialog box opens, press **OK** to install the upgrade.

To cancel pending upgrades:

1. Press the system tray icon, then select Advanced – Auto Upgrade – **Pending Upgrades**. The Pending Upgrades dialog box opens and displays the status for the following:
   - Firmware
   - Phone Application
   - Operating System
2. Press **Cancel** next to the upgrade that you want to cancel. There is one button for each upgrade type.
3. Press **OK**.

Station Password

NOTE: This option is only available when you are logged on to UC.

The station password allows you to quickly add your endpoint as a device to UC.

To set the station password:

1. Press the system tray icon, then select Advanced – **Set Station Password**.
2. Enter your old password.
3. Enter a new password.
4. Enter the new password again to confirm it.
5. Press **OK**.

Default Configuration

The Default Configuration option restores the endpoint configuration to its default state. When this option is selected, your network administrator will need to reconfigure the network settings on your endpoint if they differ from the default. In addition, you will need to re-enter your UC login information on the Session tab of the Options dialog box, as indicated in the following instructions.

NOTE: Do not select the Default Configuration option unless you are instructed to do so by your network administrator.

Self Test

The Self Test option is used as a diagnostics tool by your network administrator. The self test can help determine if the endpoint is operating properly.

NOTE: Do not select the Self Test option unless you are instructed to do so by your network administrator.

Setup Wizard

The first time your network administrator runs the client application on your Model 8690, the setup wizard automatically launches. Once the setup is complete, the wizard will not run again unless you default the endpoint.

NOTE: Do not select the Setup Wizard option unless you are instructed to do so by your network administrator.

Using Help

The system tray menu includes a **Help** option for access to telephone and UC user information. Pressing **Help** opens the online help file. Navigate to the appropriate area of the help file for assistance.

INSTALLING SOFTWARE AND FIRMWARE UPGRADES

Your endpoint may be configured to download software and firmware updates from a configured server automatically. If so, your endpoint will periodically check the server to see if any updates are available. When an update is available, the endpoint downloads it automatically. The Auto Upgrade option (see page 38) on the Advanced submenu allows you to manually search for new software versions, and access pending upgrades.

The upgrade process is explained in the following sections.

Firmware Upgrades

Your endpoint comes pre-installed with Inter-Tel-provided firmware that allows it to communicate with the telephone system. Firmware is software that is embedded in a hardware device (e.g., your endpoint) that allows it to operate. Endpoints may require updates when a new version of software or firmware is available.

When the endpoint downloads a new firmware version, you are notified that the upgrade is starting, and the client application continues to run. You can monitor the progress of the upgrade on the six-line display. When the upgrade is complete, the endpoint resets and returns to normal operation.

Telephone Client Application

When the endpoint downloads a new version of the telephone client application, the application exits and the upgrade application launches. The upgrade application downloads the new version of the client application from the TFTP server, and you can monitor the download progress. When the download completes, the upgrade application launches the Windows CE .NET installation mechanism and installs the new client application version. At this point, you are prompted for where you would like to install the new files (the default is \\Mounted Volume\8690 Phone). Press **OK** to continue with the installation. Press **Yes** when prompted to overwrite existing files. You are notified when the upgrade is complete. The upgrade application launches the new version of the client application and then exits

CAUTION

Do not press **Cancel** when the installation dialog box prompts you where you would like to install the new files. At this point the previous client application has been deleted and if you cancel the upgrade, you will need to contact your network administrator to manually reinstall the client application. Also, do not change the default location (\\Mounted Volume\8690 Phone) specified in the installation dialog box. The client application must be installed in the Mounted Volume folder to survive a reset or an upgrade to the operating system.

Operating System

When a new version of the operating system is downloaded, the client application exits, and the upgrade application launches. An upgrade of the operating system takes approximately 30 minutes to complete.

CAUTION

It is imperative that you do not interrupt the operating system process before it completes. **Do not disconnect the endpoint from it's power source or attempt to use the endpoint during the download process. These actions may cause serious damage to the endpoint, and the endpoint may need to be shipped back to Inter-Tel for repair.**

The upgrade application erases the existing version of the operating system from the persistent memory. Upon completion, the upgrade application downloads the new version of the operating system from the TFTP server. As the new version of the operating system is downloaded, it is simultaneously written to persistent memory, and you can monitor the progress. When the download and installation completes, you are notified and the endpoint resets. The registry settings are lost when the operating system is upgraded. This means that certain client application settings stored in the registry are lost as well. These include the session and diagnostic options.

Installing a New Version of Software or Firmware

When an upgrade is available, the Software Upgrade dialog box opens, and you are prompted to install the upgrade. To install the upgrade immediately, press **OK.** To install the upgrade later, you can set a reminder (see instructions below). When the reminder timer has expired, the Software Upgrade dialog box automatically prompts you to install the pending upgrade.

CAUTION

The Model 8690 does not have a built-in hard drive. Desktop shortcuts, and any preferences that have not been saved in the registry (including UC preferences) will be lost if you upgrade the operating system or if the endpoint resets. **Storage memory will not survive a reset or an upgrade to the operating system unless your data is stored in the Mounted Volume folder on the endpoint (My Computer\Mounted Volume) or on a host that is accessible from the Model 8690.**

To set a reminder to install an upgrade:

1. On the Software Upgrade dialog box, set the reminder timer using the drop-down box. Your options are:
   - **1 hour**
   - **1 day**
   - **3 days**
2. Press **Remind Me Later**. When the specified time has elapsed, the Software Upgrade dialog box opens, and you are prompted to install the pending upgrade.

MAKING AND RECEIVING CALLS

Making and receiving calls is the basic purpose of any endpoint. With your Model 8690 endpoint, you can make/receive intercom and outside calls and make emergency calls.

CAUTION

Consult your system administrator and your local Inter-Tel servicing company for important information about dialing emergency services from your Model 8690 endpoint before you begin using it.

Placing Intercom Calls

Your extension number allows other people to place intercom calls to you, without dialing any extra codes. And, because every endpoint in your system is assigned an extension number, you can call other people in your system quickly and easily.

NOTE: Ask your system administrator for a list of extensions.

To place an intercom call:

1. With or without the handset lifted, dial an extension number.
2. *If your call goes through handsfree to an endpoint's speaker,* speak after you hear a double tone.

   If you hear continuous ringing, wait for the call to be answered.

The system allows you to place a call that will force the extension you are calling to ring.

To place a call that will ring at the other endpoint until answered:
Press # before dialing the extension number.

NOTE: Dialing # before the extension number forces the called extension to ring and overrides the handsfree option.

Placing Outside Calls

With outside calls, you can talk to people who aren't members of your telephone system. When you make an outside call, however, you must dial any area codes or long distance digits that your telephone company requires.

To place an outside call:

1. With or without the handset lifted, press **Outgoing** or the **OUTGOING** menu button.
2. Dial the desired number.

Depending on how your system is programmed, you may be able to use one of the following methods to select an outgoing line, instead of pressing the **Outgoing** button:

- Dial the Outgoing Call access code (default is 8).
- Dial a Select Line Group access code (defaults are 92001-92208).
- Dial the Automatic Route Selection (ARS) access code (default is 92000).

NOTE: Check with your system administrator to see if your system uses customized feature/access codes, or if the auto dial feature (see page 35) allows you to dial out directly.

Placing Emergency Calls

With Inter-Tel communication systems, you do not have to access an outside line (press the **Outgoing** menu button) to dial an emergency number.

To make an emergency call:

Dial 9 1 1. A call is automatically placed to the preset emergency number

CAUTION

Consult your system administrator and your local Inter-Tel servicing company for important information about dialing emergency services from your Model 8690 endpoint before you begin using it.

NOTE: Dial 9 9 9 in Europe for emergency services.

Receiving Calls

When you receive an intercom or outside call, you can either answer the call or redirect it (see page 49).

To receive an intercom or outside call, do one of the following:

- Press the **ANSWER** menu button.
- Press **Answer**.
- Lift the handset.

Instead of answering a ringing call, you can press one of the following menu buttons:

- **SEND TO V-MAIL:** Sends the call directly to your voice mailbox. This option is not available if you do not have a mailbox.
- **SEND TO DEST:** Redirects the call to the intercom or outside number that you entered. (See page 49 for more information about the Redirect Call feature.)
- **DND:** Places your endpoint in Do-Not-Disturb

Call Waiting

If you receive a call while you are already on another call, your display changes to indicate that another call is ringing in.

End your current call and/or use one of the following menu buttons:

- **HOLD:** Places your current call on hold. Press **Answer** to answer the incoming call. To return to the first call press **Hold**.
- **TRANSFER:** Transfers the call to another destination. Transfer options include **OUTSIDE CALL** and **VOICE MAIL**.
- **MUTE:** Mutes the microphone on the current call.

PLACING CALLS ON HOLD

Your endpoint allows you to place up to two calls on hold.

To place a call on Hold:

1. Press **Hold**.
2. Hang up or place another call.

To return to a call that is on hold:

Lift the handset and press **Hold**.

PLACING CONFERENCE CALLS

With the Conference feature, you can establish a conference call with a total of three intercom and/or outside parties.

To place a conference call:

1. While on the first call, press ∞, and then 3 4 5 to put the call on hold.
2. Place another intercom or outside call.
3. Press ∞, and then 3 4 5 to connect the second call to the conference.

During the conference call, you can do the following:

- **To place the conference on hold:** Press **Hold**. This places the conference on hold without disconnecting the parties. To return to the conference, press **Hold**.
- **To drop out of the conference:** Hang up. This removes your endpoint from the conference, but leaves the other parties connected.
- **To mute your microphone:** Press **Mute**. This turns your microphone on or off during the conference. If mute is enabled, you can hear the conferenced parties, but they cannot hear you.

TRANSFERRING CALLS

Although transferring calls is considered a basic function of an endpoint, the Model 8690 endpoint has many advanced options for this feature. With your endpoint, you can transfer to another extension, voice mail, or even an outside line.

To Another Extension

1. Press the **TRANSFER** menu button.
2. Dial the desired extension number.
3. Wait for an answer, announce the call, and then hang up.

   If the number is busy, there is no answer, or the transfer is refused, press **Answer** to return to the caller.

NOTE: If you are receiving a transferred call and the Transfer-To-Connect option is enabled for your endpoint, you are automatically connected to the transferred caller once the transferring party hangs up. If this option is disabled, you must press **Answer** or lift the handset to answer the transferred call.

To Voice Mail

1. Press the **TRANSFER** menu button.
2. Press the **VOICE MAIL** menu button and hang up.

To an Outside Number

1. Press the **TRANSFER** menu button.
2. Select an outgoing line by pressing the **OUTSIDE PHONE** menu button.
3. Dial the desired telephone number.
4. Wait for an answer, announce the call, and then hang up.

   If the number is busy, there is no answer, or the transfer is refused, press **Answer** to return to the caller.

USING REVERSE TRANSFER

The Reverse Transfer (Call Pick Up) feature allows you to answer a call that is ringing or holding at another endpoint. For example, if the attendant transfers a call to you but you have stepped away from your endpoint, you can pick up the call using another endpoint.

To answer a call ringing or holding at another endpoint:

1. Lift the handset and dial 4.
2. Dial the extension where the call is ringing or holding. The call is transferred to the endpoint you are using and you are connected to the caller.

NOTE: If the Group Call Pickup feature is enabled, you can pick up a call ringing at any station in a hunt group by dialing the hunt group's extension number.

FORWARDING CALLS

With the Forwarding feature, you can have calls follow you (e.g., forwarded to a cell phone), or you can redirect calls to a voice mail or other extension. For greater flexibility with status changes and call forwarding, use the composite status (see page 72) and call routing features (see page 93) provided in Unified Communicator instead of DND and device forwarding.

NOTE: The **Fwd** button is also used to insert a space when you are using the dialpad to input letters or numbers.

Manual Call Forwarding

With the Forwarding feature, you can have calls follow you (e.g., forwarded to a cell phone), or you can redirect calls to a voice mail or other extension.

To forward all calls to an extension:

1. Press **Fwd**.
2. Dial the extension number to which you want to forward your calls.

To forward all calls to an outside number:

1. Press **Fwd**.
2. Press the **OUTSIDE CALL** menu button.
3. Dial the number to which you want to forward your calls.

To cancel any call forward request:

1. Press **Fwd**.
2. Press **Speaker** or #.

Redirect Call

The Redirect Call feature allows you to forward any call that is ringing on your endpoint without having to answer the call.

NOTE: You cannot redirect calls to an extension that is in DND or to a restricted outside number.

To redirect a call to an extension number:

1. *EITHER,* Press ∞ and dial 3 3 1.
   OR, Press the **SEND TO DEST** menu button.
2. Dial the extension number.

To redirect a call to an outside telephone number:

1. *EITHER,* Press ∞ and dial 3 3 1.
   OR, Press the **SEND TO DEST** menu button.
2. Press the **OUTSIDE CALL** menu button.
3. Dial the outside telephone number.
4. Press #.

REDIALING A NUMBER

The Redial feature allows you to quickly redial the last outside number you dialed. If there is no redial number available, the endpoint displays NO NUMBER TO DIAL. For UC redial options, see page 76.

To redial an outside number:

1. Press the **OUTGOING** menu button.
2. Press the **REDIAL** menu button. The number is automatically dialed.

ACCESSING VOICE MAIL MESSAGES

When you access your mailbox, you can listen to new and saved voice mail messages. After listening to your voice mail messages you can access the associated options.

NOTE: If your telephone system uses Enterprise Messaging (EM), your mailbox may have the Automatic Speech Recognition (ASR) feature enabled. When ASR is enabled for your mailbox, you have the option of issuing a spoken command or pressing a dial-pad button. See page 18 for ASR guidelines.

ALSO: If your mailbox has E-Mail Reader enabled, you have an advanced mailbox. See page 95 for information and instructions about using E-Mail Reader features.

Listening to Messages

To listen to messages:

1. Access your mailbox as described on page 27.
2. *If E-Mail Reader is enabled for your mailbox*, say "Voice Mail" or press 1.
   If E-Mail Reader is not enabled for your mailbox, skip this step.
3. *EITHER,* Say "New" or press 1 to listen to your new messages.
   OR, Say "Saved" or press 3 to listen to your saved messages.
4. While you are listening to a voice mail message, you can use the following options:
   - Say "Skip" or press # to skip to the end of the recording.
   - Say "Back up" or press 1 to "rewind" a few seconds and replay the message.
   - Say "Pause" or press 2 to pause. (Say "Continue" or press # to continue.)
   - Say "Forward" or press 3 to skip ahead.
   - Say "Lower" or press 4 to lower the volume.
   - Say "Envelope" or press 5 to play the message envelope.
   - Say "Higher" or press 6 to raise the volume.
   - Say "Save" or press 7 to save the new message in your mailbox.
   - Say "Delete Message" or press 9 to delete the message.

NOTE: You may be prompted to confirm deleting the message. Say "Yes" to delete the message or "No" to cancel the request to delete the message.

5. When the message has finished playing, you have the following options:
   - Say “Replay” or press 1 to replay the message from the beginning.
   - Say “Reply” or press 2 to reply to the message. You have the following options:
     – Say “Voice Mail” or press 1 to leave a voice mail message for the caller.

       If the caller has a mailbox number, you are prompted to verify the destination by saying “Yes” or by pressing #.

       If the number was not associated with a mailbox, the prompt requests a mailbox number.

       If the message was from an outside caller, you cannot leave a voice mail message.
     – Say “Call Back” or press 2 to make a return call. Your call will be transferred automatically to the caller’s extension or telephone number, if the number is available.

       If the user is not available, you will have the option of leaving a voice mail message.

       If the telephone number is not available, you cannot reply to the message.
   - Say “Forward” or press 3 to forward a copy of the message to another subscriber. *If you want to include an introduction,* say “Record” or press 1. Otherwise, say “Accept” or press # to forward the message without additional comments.
   - Say “Previous” or press 4 to listen to the previous message.
   - Say “Envelope” or press 5 to play the introductory message envelope (see page 61 for information on envelope options).
   - Say “Next” or press 6 to listen to the next message.
   - Say “Save” or press 7 to save the new message in your mailbox.
   - Say “Delete Message” or press 9 to delete the message.

NOTE: You may be prompted to confirm deleting the message. Say “Yes” to delete the message or “No” to cancel the request to delete the message.

6. Hang up.

Recovering Deleted Voice Mail Messages

If you accidently delete a voice mail message, you can retrieve it within a specific time frame (programmed by your system administrator). Any retrieved messages are then restored to your saved-message queue. Messages that are not undeleted within the programmed time (up to 24 hours) are automatically erased.

NOTE: If E-Mail Reader is enabled for your mailbox, you can also recover deleted e-mail and fax messages. See page 105 for instructions about how to recover deleted voice mail, e-mail, and fax messages.

To recover deleted voice mail messages:

1. Access your mailbox as described on page 27.
2. Say "Options" or press 5 for Message Options.
3. Say "Recover" or press 2 to access undelete options.
4. *EITHER,* Say "Listen" or press 1 to listen to your deleted messages and choose which ones to recover. After each message you can:
   - Say "Replay" or press 1 to replay the message.
   - Say "Reply" or press 2 to reply to the message.
   - Say "Forward" or press 3 to forward the message.
   - Say "Previous' or press 4 to listen to the previous message.
   - Say "Envelope" or press 5 to play the message envelope.
   - Say "Next" or press 6 to listen to the next message.
   - Say "Recover" or press 7 to recover the message.

   OR, say "Recover" or press 2 to recover all deleted messages.

   OR, Say "Purge" or press 3 to **permanently** delete all deleted messages.
5. Hang up.

Recording and Sending Voice Mail Messages

You can record and send voice mail messages by accessing the record option on the main menu.

NOTE: If E-Mail Reader is enabled for your mailbox, a reply to an e-mail message (see page 98) is a recorded voice message that is attached to the e-mail as a **.wav** file.

To record and send voice mail messages:

1. Access your mailbox as described on page 27.
2. Say "Record" or press 2.
3. Say or enter the desired mailbox number or group list number. The system announces the name assigned to the mailbox number or group list number. You have the following options:
   - Say "Yes" or press # to accept the subscriber's name.
   - Say "No" or press * to start over.
4. Record your message after the tone. While recording, you have the following options:
   - Press 2 to pause while recording. (Say "Continue" or press # to continue.)
   - Press 3 to erase and re-record your message.
5. When finished recording, you can press # to access the following options:

NOTE: If you select the copy or special delivery options and then do not respond to the prompts, the system will time out and deliver your message to the original recipient.

- Say "Send" or press # to send the message and return to the voice mail options.
- Say "Cancel" or press * to cancel the recording.
- Say "Replay" or press 1 to replay your message.
- Say "Append" or press 2 to add to your message.
- Say "Erase" or press 3 to erase and re-record your message.
- Say "Copy" or press 4 to copy your message to other mailboxes.

NOTE: If you are not using an Enterprise Messaging (EM) voice mail system, you can send the message to additional mailboxes from the "Special Delivery Options" menu **after** sending the message to the first recipient (see page 54).

- Say or enter the mailbox number or group list number. The system announces the name assigned to the mailbox number or group list number. You have the following options:
  - Say "Yes" or press # to accept the subscriber's name.
  - Say "No" or press * to start over.

  Press * when you are done adding mailboxes.
- Say "Options" or press 9 to use special delivery options. You can then use one or more of the following options:
  - Say "Private" or press 1 to mark the message "private." (This prevents the recipient from forwarding it to other subscribers.)
  - Say "Certified" or press 2 to mark the message "certified." (When the recipient listens to the message, you will receive a receipt notice.)
  - Say "Priority" or press 3 to mark the message "priority." (This will place your message ahead of all other waiting messages in the receiving mailbox.)
  - Say "Cancel" or press * to cancel delivery options.
  - Say "Send" or press # to send the message and return to voice mail options.

NOTE: If you are not using an EM voice mail system, you can send the message to additional mailboxes **after** sending the message to the first recipient.

To send the message to additional mailboxes from a non-EM system:

1. After sending the first message, press # and then enter the next recipient's mailbox number.
2. Press # to send the message or press * to exit and return to voice mail options.

6. Hang up.

Canceling Unheard Voice Mail Messages

You can cancel unretrieved messages that you have sent to individuals, but not messages that you sent to group lists.

To cancel unheard voice mail messages:

1. Access your mailbox as described on page 27.
2. While listening to the voice mail main menu, say "Options" or press 5 for Message Options.
3. Say "Unheard" or press 1.
4. When prompted, say or enter the number of the mailbox containing the unheard message.
5. Say "Yes" or press # to confirm the mailbox you are selecting. Voice mail will tell you how many messages you have waiting at the mailbox and play them for you. After each message, you can:
   - Say "Replay" or press 1 to replay the message.
   - Say "Append" or press 2 to add to the message.
   - Say "Forward" or press 3 to forward the message to another mailbox.
   - Say "Previous" or press 4 to listen to the previous message.
   - Say "Envelope" or press 5 to play the message envelope.
   - Say "Next" or press 6 to listen to the next message.
   - Say "Save" or press 7 to save the message in your mailbox.
   - Say "Delete Message" or press 9 to delete the message.

   NOTE: You may be prompted to confirm deleting the message. Say "Yes" to delete the message or "No" to cancel the request to delete the message.
6. Hang up.

USING DO-NOT-DISTURB MODE

If you are away from your desk, or if you do not want to be disturbed, you can use the DND feature. This halts all calls to your endpoint except recalls and direct ring-in calls. When other users call your endpoint, they hear a repeating signal of four fast tones and, if they have a display endpoint, they will see that you are in DND.

To enable/disable DND:
Press the **DND** menu button.

Moving On

SECTION CONTENTS PAGE

Introduction 58
Setting Endpoint Preferences 58
Changing Volume Levels 58
Selecting a Ring Tone 59
Setting Mailbox Preferences 60
Changing Your Mailbox Password 60
Changing the Voice Mail Message Envelope 61
Changing the Call Screening Transfer Method 62
Programming a Fax Destination 63
Changing the Message Search Order 63
Programming Remote Messaging 64
Screening Calls 66
Using the Voice Mail Directory 67

INTRODUCTION

Now that you've mastered the basics, it's time to move on to the advanced features. In this section, you'll learn how to program your endpoint, use the voice mail directory, access your voice mailbox remotely, and perform various other functions.

The features in this section do not require the endpoint to be logged on to UC. For instructions on how to use UC advanced features on your endpoint, see page 69.

For additional programming information, see the *Model 8690 Administrator's Guide*.

SETTING ENDPOINT PREFERENCES

Your endpoint is automatically set to specific defaults. You can, however, configure the settings for volume and ring tone at any time.

Changing Volume Levels

The endpoint has eight volume settings accessed through "soft" buttons on the interface: ringer, handset call, handset dial tone, speakerphone call, speakerphone dial tone, headset call, and headset dial tone.

NOTE: To change each of these levels, you must be using that feature. For example, if you want to change the outside call volume level, you must be on an outside call.

To change a volume level:

Press the Up **Volume** button to increase the volume. Press the Down **Volume** button to decrease the volume.

To save your change:

Press **Volume** to save your changes.

Selecting a Ring Tone

The ability to change your ring tone is helpful in close-quartered environments. If your ring tone is unique, you can quickly identify when a call is ringing on your end-point.

To select the type of ring tone for your endpoint:

1. With the handset in the cradle, dial 3 9 8.
2. Do one of the following to select your ring tone:
   - Press 0 or the **RINGER OFF** menu button for no ringing.
   - Press the **PREVIOUS** or **NEXT** menu button to scroll to the desired tone.
   - Press the high (up arrow) or low (down arrow) end of the **Volume** button to scroll to the desired tone.
   - Dial 1-9 to select a specific tone.
3. When you hear the tone you want, you can do any of the following:
   - Press #.
   - Press the **ACCEPT** menu button.
   - Lift and replace the handset.

SETTING MAILBOX PREFERENCES

Your mailbox contains personal options to allow you to customize voice mail functions. However, before you change your voice mail options, you must first initialize your mailbox (see page 24). Although voice mail displays are not supported in SIP mode, audio prompts are supported.

NOTE: If your telephone system uses Enterprise Messaging (EM), your mailbox may have the Automatic Speech Recognition (ASR) feature enabled. When ASR is enabled for your mailbox, you have the option of issuing a spoken command or pressing a dialpad button. See page 18 for ASR guidelines.

ALSO: If your mailbox has E-Mail Reader enabled, you have an advanced mailbox. See page 95 for information and instructions about using E-Mail Reader features.

Changing Your Mailbox Password

Your password prevents unauthorized access to your mailbox. When you first initialize your mailbox, you are prompted to change your password from the default (your mailbox number).

You can change your mailbox password at any time. The new password can be up to 12 digits long and must be numeric.

To change your mailbox password:

1. Access your mailbox as described on page 27.
2. Say "Personal" or press 4 to select the Personal Options Menu.
3. Say "Password" or press 3.

   If you want a password, enter a new password using digits 0-9 (up to 12 digits), and then press # when you are done. The messaging system plays back your password.

   If you do not want to use a password, just say "Skip" or press #.
4. Say "Accept" or press # to accept the password as entered or say "Re-enter" or press 3 to erase and re-enter your password.
5. Hang up.

Changing the Voice Mail Message Envelope

When you receive a voice mail message, the voice mail system plays an "envelope" that can include the time and date the message was left, the source of the message, and/or the message length. By default, the envelope contains all of this information, but you can change your envelope, as described below.

NOTE: If E-Mail Reader is enabled for your mailbox, you can also change your e-mail and fax message envelopes. See page 106 for instructions about how to change your voice mail, e-mail, and fax message envelopes.

To change your voice mail message envelope:

1. Access your mailbox as described on page 27.
2. Say "Personal" or press 4 to select the Personal Options Menu.
3. Say "Envelope" or press 4 to select the Message Envelope Options Menu.
   You can then do any of the following:
   - Say "Time, Date" or press 1 to enable or disable the time and date options.
   - Say "Source" or press 2 to enable or disable the message source option.
   - Say "Length" or press 3 to enable or disable the message length option.
   - Say "All Options" or press 4 to enable all options and return to the Personal Options Menu.
   - Say "None" or press 5 to disable the entire envelope and return to the Personal Options Menu.
   - Say "Accept" or press # to accept the changes.
   - Say "Cancel" or press * to return to the Personal Options Menu.
4. Hang up.

Changing the Call Screening Transfer Method

NOTE: The Call Screening feature is available only if it is enabled for your mailbox. Contact your voice mail administrator to see if this feature is enabled for your mailbox.

Depending on the transfer method you select, calls that are transferred from your mailbox may be one of the following:

- **Unannounced Calls:** Calls are sent directly to your extension.
- **Announce-Only Calls:** Before voice mail transfers a call to you, a prompt asks the caller to record his or her name. When you answer, you hear "You have a call from (caller's name)." Then the call is sent to your extension.
- **Screened Calls:** Before voice mail transfers a call to you, a prompt asks the caller to record his or her name. When you answer, you hear "You have a call from (caller's name)." You can choose whether or not to accept the call.

See page 66 for instructions about using the call screening feature.

To change your transfer method (if enabled):

1. Access your mailbox as described on page 27.
2. Say "Personal" or press 4 to select the Personal Options Menu.
3. Say "More" or press 9 for More Options.
4. Say "Transfer" or press 5. The system tells you what your current transfer method is. You can then select the desired transfer method, as follows:
   - Say "Unannounced" or press 1 to select unannounced transfers.
   - Say "Screened" or press 2 to select screened transfers.
   - Say "Announce" or press 3 to select announce-only transfers.
   - Say "Cancel" or press * to return to the Personal Options Menu without making changes.
5. Hang up.

Programming a Fax Destination

With the Inter-Tel voice processing system, when you specify a fax destination number for your mailbox, callers can access your mailbox to send a fax to your fax machine.

To change your fax destination number:

1. Access your mailbox as described on page 27.
2. Say "Personal" or press 4 to select the Personal Options Menu.
3. Say "More" or press 9 for More Options.
4. Say "Number" or press 1.
5. Say or enter the number of your fax destination. (If you entered the letters using the dialpad, press # when you are done.)
6. *EITHER,* say "Accept" or press # to accept the number.
   OR, say "Re-enter" and press 3 to erase and re-enter the number.
7. Hang up.

Changing the Message Search Order

You can change the order in which you retrieve your messages based on the date and time you receive them. When more than one message is left in your mailbox, they are available for you to access in the order you specify. The search order, can be configured as first in/first out, or last in/first out.

NOTE: If E-Mail Reader is enabled for your mailbox, when you change the message search order, your changes apply to your voice mail, e-mail, and fax messages.

To change the message search order:

1. Access your mailbox as described on page 27.
2. Say "Personal" or press 4 to select the Personal Options Menu.
3. Say "More" or press 9 for More Options.
4. Say "Order" or press 2 for the Message Search Order.
5. Select one of the following options:
   - Say "New" or press 1 to change the search order for new messages.
   - Say "Saved" or press 2 to change the search order for saved messages.
6. Your current message search order is played. Select one of the following options:
   - Say "First" or press 1 to retrieve the earliest-received messages first (First In/First Out).
   - Say "Last" or press 2 to retrieve the latest-received messages first (Last In/First Out).
   - Say "Cancel" or press * to return to the Personal Options Menu without making changes.
7. Hang up.

Programming Remote Messaging

NOTE: The Remote Messaging feature is available only if it is enabled for your mailbox. Contact your voice mail administrator to see if this feature is enabled for your mailbox.

ALSO: The remote messaging feature is supported for voice mail messages only. If E-Mail Reader is enabled for your mailbox, you cannot use remote messaging for e-mail and fax messages.

With Remote Messaging, you can program voice mail to call you when your mailbox receives new voice mail messages. Using a "cascade" (a series of up to nine telephone numbers), voice mail will call each number until it successfully connects to a device (e.g., pager, answering machine, etc.).

Because your mailbox can have a primary and an alternate cascade of numbers, you can program a cascade to be used during specific days and times. For example, if you want to be paged when you receive a voice mail message from 5-10 PM on weekdays, you can set up a primary cascade. If you also want to receive pages for messages marked "priority" on the weekends, you could set your alternate cascade for all day on Saturdays and Sundays.

To set up remote messaging for voice mail messages (if enabled):

1. Access your mailbox as described on page 27.
2. Say "Personal" or press 4 to select the Personal Options Menu.
3. Say "Remote" or press 5. You have the following options:
   - Say "Primary" or press 1 to set up a primary cascade.
   - Say "Alternate" or press 2 to set up an alternate cascade.
4. Say "Level" or press 1 and then say or enter the number (1-9) of the level you wish to program. You then have the following options:
   - **To set up or change an extension or outside number:**
     – Say "Number" or press 2.
     – *EITHER,* say "Internal" or press 1 for an extension number.
     OR, say "Outside" or press 2 for an outside number.
     – Say or enter the number.
   - **To set up or change pager notification:**
     – Say "Pager" or press 1.
     – Say "Personal" or press 2.

   Say "Change" or press 1 to enable or disable the number.
5. Say "Days" or press 3. Then select one of the following:
   - Say "Weekdays" or press 1 for Monday-Friday.
   - Say "Days" or press 2 for all days.
   - Say "Day" or press 3 to select individual days. You are prompted to say or press numbers 1-7 which correspond to the days Sunday through Saturday.
6. Say "Time" or press 2. Then say or enter the times you want the message notification to start and stop. Enter or say the times with two digits for the hour and two digits for the minutes (e.g., 0900 = 9:00). If entering the time in 12-hour format:
   - Say "AM" or press 1 for AM.
   - Say "PM" or press 2 for PM.

   NOTE: For 24-hour notification, program the starting and ending times to be the same.
7. Say "Category" or press 4. You have the following options:
   - Say "All Messages" or press 1 for all messages.
   - Say "Priority" or press 2 for priority messages only.
8. Hang up or press # to save the settings and exit.

NOTE: If for some reason voice mail is not able to use your remote notification, your mailbox will receive a message stating that notification could not be completed.

SCREENING CALLS

If desired, you can screen calls that are transferred from voice mail. This allows you to accept and/or refuse specific calls. Depending on the call screening transfer method you select (see page 62), calls from voice mail may be unannounced, announce only, or screened.

When your mailbox is programmed for screened calls, you have the following options when you receive a transfer:

- Say “Accept” or press # to accept the call.
- Say “Replay” or press 1 to replay the announcement.
- Say “Voice Mail” or press 2 to send the call to voice mail.
- Say “Forward” or press 3 and then enter the extension number to forward the call to another extension.
- Say “Refuse” or press * to refuse the call.

USING THE VOICE MAIL DIRECTORY

With the voice mail directory, subscribers and non-subscribers can use ASR (if enabled) or dialpad buttons to search for names in the directory. Subscriber names are automatically added to the directory when their mailbox is initialized. ASR may not be able to locate names that are pronounced differently than they are spelled. For these types of names, use the alternate search method of spelling the name using the endpoint dialpad buttons (see table below).

You begin a search by dialing the system voice mail extension and selecting the directory option. You are prompted to say or spell the name of the mailbox user you want to search for. For example, if you say the name John, the system locates all of the subscribers with the first or last name of John. The list of names returned might include the names John Smith, John Jones, John Nielson, David John, Robert John, etc.

When one to 10 matches are located, you can browse the list of returned names by selecting the Previous (say "Previous" or press 1) and Next (say "Next" or press 3) options. The directory lists are circular. That is, when the end of the list is reached, the next name played will be the first name in the directory. When the correct name is played say "Yes" or press # to select it.

If the system locates more than 10 matches, you can either browse the list using the options mentioned above, or filter the list by responding to the filtering questions generated by the system. Based on your responses, the system filters the list to include first or last name matches only. If the system cannot locate an exact match, it returns the closest match found.

To use the dialpad buttons to spell a name: When prompted, press a single digit on your endpoint dialpad for each letter or character entered. For example, dialpad button 2 shows ABC, button 3 shows DEF, etc. To enter "JONES," you would press 5 6 6 3 7. Press 7 for "Q", 9 for "Z", and 1 for punctuation marks.

To perform a directory search:

1. Dial the voice mail number.
2. Say “Directory” or press #.
3. Say the last name of the person you are searching for or press the appropriate dialpad buttons to spell the name (see page 67).

   If 10 or fewer matches are located, you can access and browse the list immediately (see step 4.)

   If the list contains more than 10 matches, you have the option to browse or filter the list. (skip step 4. and see step 5.)
4. If 10 or fewer matches are located, you have the following options:
   - Say “Yes” or press # to accept the name that is played.
   - Say “Previous” or press 1 to browse to the previous name in the list.
   - Say “More” or press 2 to hear more information about the subscriber.
   - Say “Next” or press 3 to browse to the next name in the list.
   - Say “New” or press 4 to search for a new name.
   - Say “Cancel” or press * to exit the directory.
5. If more than 10 matches are located, the system prompts you to browse or filter the list. Do one of the following:
   - Say “Yes” or press 1 to browse the list. (See step 4. for options).
   - Say “No” or press 2 to select the filter option and then respond to one of the following filter questions:
     – The system begins by asking you if the name you are searching for is the last name. If it is, say “Yes,” press 1, say the last name, or spell the last name.
     – If you did not respond to the first question, the system asks if the name you are searching for is the first name. If it is, say “Yes,” press 1, say the first name, or spell the first name.

   After the list has been filtered by first or last name, a smaller list of names is returned. You can then browse the list and select the appropriate name (see step 4.)

Using UC

SECTION CONTENTS PAGE

Introduction 70
Logging On and Off of UC 70
Using UC Views 71
Placing a Call 71
Changing Web Client Options 71
Unified Communicator View 72
Changing Your Status 72
Creating a Temporary Status 72
Performing a Search 73
Redialing a Number 76
Running Feature Code Favorites 76
Working With the Speed-Dial List 77
Messages View 78
Call List View 79
Call Log View 83
Call Log Main Screen 83
Call Details Dialog Box 86
Address Book View 87
Sorting Address Book Contacts 87
Filtering Address Book Contacts 88
Adding a Linked Contact 90
Call Routing View 93
Receiving New Message Alerts 93
Receiving Status Change Alerts 94
Receiving Incoming Call Alerts 94

INTRODUCTION

In this section you'll learn how to log on and off of Unified Communicator (UC) and use UC views to access advanced endpoint features and presence management options.

NOTE: Before you use UC on your Model 8690, you must create a UC account using the Web Client, which is the primary UC client that runs on your PC desktop (see page 71). In addition, some UC options can only be changed or implemented from the Web Client. For information about using the Web Client, see the latest version of the *Unified Communicator User Guide.*

LOGGING ON AND OFF OF UC

The client application is configured to start automatically when the endpoint powers up. Although the client application may be running, you may not be logged on to UC (as indicated with the system tray icon). If the client application is not running, you can launch it manually by navigating to My Computer\Mounted Volume\8690 Phone and then double-pressing **`8690Phone.exe`**.

To log on to UC:

1. Press the system tray icon, then select **Log on** from the menu. *If UC is not configured to log on automatically, you are prompted for the following information:*
   a. Enter the **Web Address** that you use to access UC. The Web address is in the format http://<UC Machine Name or IP Address>/uc. (It is the same address you use to log on to UC from your Web Client on your PC.)
   b. Enter your account **Username**. (This is the same username that you use to log on to UC on your desktop PC.)
   c. Enter your account **Password**. (This is the same password that you use to log on to UC on your desktop PC.)
2. Enable the **Automatically log on** option if you would like to log on automatically to UC without entering the Web address, username, and password information.

   If this option is enabled, the application will not prompt you for Web address, username and password information, unless you have not already provided it or the logon fails.
3. Press **OK** in the upper, right corner of the dialog box.

NOTE: If you enter the wrong username/password on three consecutive attempts, an error message appears, the logon dialog box closes, and you must attempt another logon from the system tray menu.

To log off of UC:

Press the system tray icon, then select **Log off** from the menu. The UC view items on the main interface are disabled.

USING UC VIEWS

This section provides instructions on how to use UC features and options from your Model 8690 endpoint.

Placing a Call

The most common task you can complete using UC is to place a call. You can place a call using any of the following features in the UC view:

- Search feature (see page 73)
- Redial feature (see page 76)
- Speed-Dial list (see page 77)

You can also place a call from the following UC views:

- Call Log (see page 83)
- Messages (see page 78)
- Address Book (see page 87)

Changing Web Client Options

Before you begin using UC on your endpoint, note that some options must be changed or implemented from the Web Client on your PC. These options include:

- Synchronizing your Address Book
- Editing your Favorites list (list of often-used feature codes)
- Changing DND on a device
- Changing Manual Forwarding on a device
- Editing personal account information and preferences
- Using Advanced Search
- Adding, editing, and deleting the following:
  - Devices
  - Statuses
  - Groups
  - Call Routing Rules
  - Greetings
  - Speed-Dial buttons

NOTE: You cannot access the UC Web Client URL from your endpoint's browser.

For instructions on using the Web Client on your desktop PC, see the latest version of the *Unified Communicator User Guide*.

UNIFIED COMMUNICATOR VIEW

The Unified Communicator view displays an icon of your current status next to your current location in the upper-left portion of the screen. The icon indicates that you are available. The icon indicates that you are unavailable. On the right side of the screen, there is a drop-down list that contains all of your saved status entries. You can use this list to change your status to any of the saved status entries. In addition, you can create a temporary status by pressing the icon located to the right of the drop-down list.

Changing Your Status

NOTE: You must use the Web Client to delete and edit your Status **as well as to create your new, permanent composite status**. You can however, create a temporary status using your endpoint.

You can change your UC status using the status drop-down box in the UC view next to the composite status icon.

To change your status:

1. Press **Unified Communicator** on the endpoint display.
2. Select a status from the drop-down list next to the icon. Your status icon changes to reflect the selected status.

Creating a Temporary Status

There are times when you may not be able to create a new composite status with the Web Client. For example, you may be going to a new location for a short time. In this case, you can create a new temporary composite status for this location.

To create a temporary composite status:

1. Press **Unified Communicator** on the endpoint display.
2. Press .
3. Select a status in the Temporary Status dialog box. Your choices are:
   - Available
   - Unavailable
4. Enter an extension number where you can be reached.
5. Press **Create Status**. Your status switches to the new temporary composite status, and the temporary status is saved in the status drop-down list.

Performing a Search

NOTE: You must use the Web Client to use the **Advanced Search** function.

ALSO: Unified Communicator will automatically try to eliminate duplicate results from the search results list. If the search matches an account, as well as one or more devices owned by the account, the search results only display the matching account.

The type-ahead search function allows you to search for contacts, accounts, or devices. The search function searches the following contact fields:

- first name
- middle name
- last name
- company
- device username
- device description
- device extension

Each search will match on the search text if it appears anywhere within one of the above fields. For example, a search for "sc" would match on all of the following:

- Contact with First Name: **Sc**ott
- Contact with Last Name: Pre**sc**ott
- Contact with Middle Name: Ro**sc**o
- Contact with Company: Bill's **Sc**ooters

Search results appear in a table under the following columns as you type:

- **Name**: Indicates the type of contact displayed with an icon and the contact or device name. If the contact is an account or a device in your address book, the icon also indicates the current status. If the contact is an account or device that is not in your address book, the icon indicates the result type, but it will indicate an unknown status. The search area results may include one or more of the following icons:

  Account icons

  Indicates that the status of the user is currently unknown. Press this icon to retrieve a snapshot of the status. The snapshot reverts back to an unknown state in approximately 30 seconds.

  Indicates that a user is currently available.

  Indicates that a user is currently unavailable.

  Indicates that a user is currently on a call.

Device icons

Indicates that the DND status for the device is currently unknown. This icon displays if the type-ahead results display a device that is not currently in your address book. Press this icon to retrieve the status. The snapshot reverts back to an unknown state in approximately 30 seconds. This icon can also appear when the node the device belongs to is down or when the connection between UC and the CT Gateway is down.

Indicates that the DND status for the device is currently OFF.

Indicates that the DND status for the device is currently ON.

Indicates that the device is currently on a call.

Static contact icons

Indicates a simple contact in your address book. No status information is available for this result type.

Indicates a simple company contact in your address book. No status information is available for this result type.

- **Source:** Indicates where the search result was found. The source may be one of the following: address book, accounts, or devices.
- **Options:** Pressing the icon opens the Call dialog box. You can place a new call or transfer the selected call in your Call List to this contact.

To perform a search:

1. Press **Unified Communicator** on the endpoint display.
2. Press **Search**.
3. Use the Input Panel to enter search information by contact or device name or by number.

4. When the search is complete, do any of the following:
   - **To add the search result to the address book or speed-dial list:**
     a. Select the search result.
     b. Press **Add to Address Book** or **Add to Speed Dial**. Adding a contact to your speed dial-list automatically adds it to your address book.
   - **To place a call:** Press the icon next to a contact to open a Call dialog box that lists the telephone numbers for the contact. You can also double-press a search result to open the place call dialog. This icon does not appear if no numbers exist (i.e., number field is blank). Select from any of the following options:
     – Press one of the numbers in the list to initiate a call to that number.
     – Press **Find Me** to place a call to the account's primary device, allowing the account's call routing rules to route the call to the appropriate location. This option is only available if the contact is linked to an account, and the account has at least one device associated with it.
     – If the contact is linked to an account with at least one device, or if the contact is linked to a device, there will be two additional options in the popup menu: Voicemail and Leave Message. Press **Voicemail** to call the voice mail of the given person/device. Press **Leave Message** to leave a station message for the given person/device. If you leave a station message, the station message is left at the current location, or it is left at the primary device if the current location is not a UC device.

Redialing a Number

The Redial feature displays the last five outgoing calls (from the call log) as buttons containing information about the call. You can press one of the buttons to place a return call.

To redial a number:

1. Press **Unified Communicator** on the endpoint display.
2. Press **Redial**. The Redial dialog box appears.
3. Press one of the five buttons in the list. The Call dialog box appears.
4. Select from any of the following options:
   - Press one of the numbers in the list to initiate a call to that number.
   - Press **Find Me** to place a call to the account's primary device, allowing the account's call routing rules to route the call to the appropriate location. This option is only available if the contact is linked to an account, and the account has at least one device associated with it.
   - If the contact is linked to an account with at least one device, or if the contact is linked to a device, there will be two additional options in the popup menu: Voicemail and Leave Message. Press **Voicemail** to call the voice mail of the given person/device. Press **Leave Message** to leave a station message for the given person/device. If you leave a station message, the station message is left at the current location, or it is left at the primary device if the current location is not a UC device.

Running Feature Code Favorites

NOTE: You must use the Web Client to set up your **Favorites** list.

The Favorites button displays a list of feature code favorites for each device you own.

To run a feature code favorite:

1. Press **Unified Communicator** on the endpoint display.
2. Press **Favorites**. The Feature Code Favorites dialog box appears.
3. Press the feature code you want to run.

NOTE: Some feature codes may require additional input on the display.

Working With the Speed-Dial List

If you have added contacts to your speed-dial list, the list is located below the **Search**, **Redial**, and **Favorites** buttons (the location may vary depending on the display skin used). The speed-dial list provides quick access to frequently called numbers and shows the current status of accounts and devices.

NOTE: If you have several speed-dial entries, they are displayed (in alphabetical order) on two or more pages labeled “Page 1,” “Page 2,” etc. Click the page label to switch to that page of buttons.

To add contacts to the speed-dial list, use one of the following options:

- *If you want to use the address book*, press an address book entry to select it, then press **Add To Speed Dial**.
- *If you want to use the type-ahead search*, press a search results item to select it, then press **Add to Speed Dial**. Refer to page 73 for information on the using the Search feature.

NOTE: To select a range of items, activate the Input Panel (see page 13). Select the first item in your list, press the SHIFT key on the Input Panel, then select the last item in the list. You can also select one item, then press the CTRL key and select additional items.

To delete speed-dial list buttons:

Use the Web Client from your desktop to delete speed-dial buttons from the speed-dial list, or to add/edit the list directly.

To make a call using a speed-dial button:

1. Press **Unified Communicator** on the endpoint display.
2. Press a speed-dial button.
3. Select from any of the following options:
   - Press one of the numbers in the list to initiate a call to that number.
   - Press **Find Me** to place a call to the account’s primary device, allowing the account’s call routing rules to route the call to the appropriate location. This option is only available if the contact is linked to an account, and the account has at least one device associated with it.
   - If the contact is linked to an account with at least one device, or if the contact is linked to a device, there will be two additional options in the popup menu: Voicemail and Leave Message. Press **Voicemail** to call the voice mail of the given person/device. Press **Leave Message** to leave a station message for the given person/device. If you leave a station message, the station message is left at the current location, or it is left at the primary device if the current location is not a UC device.

MESSAGES VIEW

The Messages view displays a list of voice mail, station, and system messages. Additional details are provided when pressing Details.

The messages are listed in a table containing the following columns:

- **From:** Specifies the message type. This column also indicates the telephone number (and the name, when available) of the caller that left the station or voice mail message. If the message is a system message, this column displays the message.
- **Mailbox:** Indicates the mailbox where the voice mail message was left.
- **Number:** Indicates the number of voice mail messages left in the mailbox.
- **Options:** Contains icons allowing access to voice mail, station, or system messages.

To check voice mail, station, or system messages:

Press **Messages** on the endpoint display. The actions you take depend on the message type. Message types include the following:

Station Message: Press the icon next to a station message to place a call to the person that left the station message, or double-press the station message to place the call.

Voice Mail Message: Press the icon next to a voice mail message to place a call to your voice mail system, or double-press the voice mail message to place the call.

System Message: Press the icon to open a dialog box showing the system message text. You can also select the Details button below the message list to open a dialog box displaying the complete system message text.

To delete station or system messages:

1. Press **Messages** on the endpoint display.
2. Select one or more station or system messages, then press **Delete**.

NOTE: You can only delete voice mail messages using the voice mail system.

CALL LIST VIEW

The Call List view displays a list of your current calls. These include calls that are ringing, connected, or holding. The Call List view automatically appears any time you place or receive a call and remain active until you navigate to a different view. When the last call in the list ends, the previous view is displayed. You cannot sort the call list. The call list shows all call activity for every device you own (in addition to the Model 8690).

If an incoming caller is positively identified, a Caller ID icon ( )appears next to the caller's name. This indicates the caller was positively identified and the call followed any routing rules you may have set up for the caller. Calls are displayed under three columns:

- **State:** Indicates the current call state. Call states include the following:

  Indicates a call that is currently in the dialing stage.

  Indicates an incoming ringing call. Double-press to answer.

  Indicates an outgoing ringing call.

  Indicates a connected call.

  Indicates a muted, connected call.

  Indicates a connected conference call.

  A combination of these two icons indicates a muted, connected conference call.

  Indicates a call you placed on hold. Double-press to answer.

  Indicates you are currently holding for a connected call.

  Indicates a call in an error state. The most common example is a call you place to an endpoint that is in DND. When this occurs, you hear a fast busy tone for approximately one minute before the call terminates. During this time, the call is displayed in the call list where you can terminate the call earlier if desired.

  Indicates that group listen is currently enabled on the call.

  Indicates that the given call is currently being recorded.

- **Name:** Indicates the name of the party on the other end of the call. A name is only displayed if it is known. Next to the name, the icon indicates positive Caller ID.
- **Number:** Indicates the number (if known) of the party on the other end of the call.

- **Call Control Buttons:** Below the call list, buttons appear that allow you to control the selected call(s). If you select a call from the call list, the state of the call determines which Call Control buttons are displayed. Call Control buttons include:

  Hold Places the selected call on hold. This button is only present if the selected call is in a connected state.

  Answer Answers the selected call. This button is only present if the selected call is an incoming ringing call or if the call is on hold.

  Transfer Transfers the selected call. Refer to page 81 for more information about transferring a call.

  Mute Toggles the Mute feature on and off for the selected call. You can tell whether or not the selected call is currently muted based on the icon displayed in the state column (see page 79). If your current active call is muted, the **Mute** button on the dialpad is shown in a selected state. Depending on the skin you are using, the button may appear with a lamp next to it, or it may appear highlighted.

  Record Toggles the Record-A-Call feature on or off for the selected call. You can tell whether or not the selected call is currently being recorded based on the icon in the state column (see page 79). After the call is recorded, it is sent to your voice mail. If you have selected the option to receive message alerts, a popup message indicates the mailbox number.

  Hangup Ends the call.

  Delete Deletes the selected item from the list.

  Details Displays detailed information for the selected item in the list.

  NOTE: Call Control buttons are displayed based on the features that are enabled on the system *and* the state of the displayed call. The operating mode of the endpoint dictates which features are supported. For example, if the Record-A-Call feature is not enabled, Record is not displayed. Similarly, if the call is in a state that does not support the Record-A-Call feature (i.e., on hold), Record is not displayed.

When UC receives a call from a telephone number that it cannot match to a contact in the address book, it uses positive Caller ID to try to identify the caller. If the caller is identified as a contact in your address book, a wizard automatically launches after you answer the call to allow you to save the new number for the contact.

The following instructions are for common tasks that you can perform using the Call List view.

To save a new telephone number for an identified contact:

1. Select the contact type to associate with the number (e.g., Mobile, Home, etc.).
2. Press **OK** to store the number or **Cancel** to cancel.
3. Select the check box if you do not want to be prompted to save numbers in the future. You can also set this preference by navigating to **My Account** on the Web Client.

To place a call on hold:

1. Select the call you want to place on hold.
2. Press Hold.

The icon indicates that a call is on hold. To answer a call on hold, press Answer.

To transfer a call using Transfer:

1. Select the call you want to transfer.
2. Press Transfer.
3. *If you want to transfer to a number:* Enter the digits and press **OK** to transfer the call.

   If you want to search for the party to which you want to transfer: Press the **Search** button. Your cursor is placed in the type-ahead search box. Type the name of the person to which you want to transfer the call. The search results include a transfer icon ( ) in the features column. Press the icon to transfer the call to that person.

To transfer a call using a type-ahead search:

1. Select the call you want to transfer.
2. Go directly to the type-ahead search and search for a person.
3. Press next to the search result to transfer the call to that person.

To mute a call:

1. Select the call you want to mute.
2. Press Mute.

NOTE: The icon indicates that a call is muted. To unmute a call, select the call and press Mute.

To record a call:

1. Select the call you want to record.
2. Press Record.

To stop recording the call, select the call and press Record.

NOTE: Recorded calls are saved in voice mail. When you record a call, a voice mail message icon indicates that you have a new voice mail message, and a voice mail indication appears on your endpoint. If you have chosen to receive message alerts, you also receive a message alert.

To create a conference call, use one of the following options:

- *If you want to conference selected or holding calls*: Select two or more connected or holding calls in your call list. Press Conference.
- *If you want to conference all calls*: With one call selected, press Conference.

The selected connected and/or holding calls disappear from your call list, and a new conference call appears.

NOTE: Conference is only present if you have two or more calls in your call list that can be conferenced. The conference call displays as a single call in the call list indicated with **CONFERENCE**. Each conference member is displayed under the call by name (if available) or by number.

To drop a party from a conference call:

Press the icon next to the name of the person, or select the name of the person you want to drop from the conference, and then press Hangup. This option is only visible in the call list of the conference originator.

To end a conference call:

Select the call and press Hangup.

CALL LOG VIEW

The Call Log view allows you to view a history of your recent calls. For each call, you can view call details such as the call type, date and time of the call, and the name and number of the person that called. If a call in the log was from another UC account or device, the current account/device status is also displayed. You can return a call directly from the call log, and you can add a call log entry to your address book.

The main call log screen displays the date and time of the call, the name and number of the called party and the call result. Additional details are provided when pressing Details.

Call Log Main Screen

The call log main screen displays the following information:

- Date/Time:

Indicates an incoming call was answered.

Indicates an incoming call was missed.

Indicates an incoming call was transferred to another destination.

Indicates an incoming call went to voice mail.

Indicates an outgoing call was answered.

Indicates an outgoing call was not answered.

Indicates an outgoing call was transferred to another destination.

- **Name/Number:** Displays the name and number of the caller or called party (if available). If the name/number is not recognized, UC indicates that the called party/caller is unknown. If the caller is a device or account (or a contact linked to a device or account), this column also displays the caller's current status as an icon. If the caller exists in your address book, the caller's current status is always displayed and is updated in real time as the status changes. The status icon can be one of the following:

  Indicates that the status of the user is currently unknown. Press this icon to retrieve a snapshot of the status. The snapshot reverts back to an unknown state in approximately 30 seconds.

  Indicates that a user is currently available.

  Indicates that a user is currently unavailable.

  Indicates that a user is currently on a call.

  Indicates that the DND status for the device is currently unknown. This icon displays if the type-ahead results display a device that is not currently in your address book. Press this icon to retrieve the status. The snapshot reverts back to an unknown state in approximately 30 seconds. This icon can also appear when the node the device belongs to is down or when the connection between UC and the CT Gateway is down.

  Indicates that the DND status for the device is currently OFF.

  Indicates that the DND status for the device is currently ON.

  Indicates that the device is currently on a call.

  Indicates a call log entry that is neither a device or account. The presence of this icon does not necessarily indicate that the given name/number corresponds to an entry in your address book.

- **Result:** Indicates the call result as any of the following:
  - **Missed:** Indicates the incoming call was not answered.
  - **Answered:** Indicates the called party answered the call.
  - **Answered at:** Indicates the incoming call was answered at the specified endpoint.
  - **Unanswered:** Indicates the outgoing call was not answered.
  - **Voice mail:** Indicates the call went to your voice mailbox.
  - **Transferred to <number>:** Indicates the call was transferred

To sort the call log:

1. Press **Call Log** on the endpoint display.
2. Press any of the call log columns to sort the call log by date and time, name and number, or call result.

To return a call:

1. Press **Call Log** on the endpoint display.
2. Double-press the icon next to the entry.
3. Select from any of the following options:
   - Press one of the numbers in the list to initiate a call to that number.
   - Press **Find Me** to place a call to the account's primary device, allowing the account's call routing rules to route the call to the appropriate location. This option is only available if the contact is linked to an account, and the account has at least one device associated with it.
   - If the contact is linked to an account with at least one device, or if the contact is linked to a device, there will be two additional options in the popup menu: Voicemail and Leave Message. Press **Voicemail** to call the voice mail of the given person/device. Press **Leave Message** to leave a station message for the given person/device. If you leave a station message, the station message is left at the current location, or it is left at the primary device if the current location is not a UC device.

To add a call log entry to the address book:

1. Press **Call Log** on the endpoint display.
2. Select one or more entries containing a name or number, then press **Add to Address Book**. The entry is added to your Address Book.

NOTE: Call log entries without a name or number are ignored.

To delete a call log entry:

1. Press **Call Log** on the endpoint display.
2. Select one or more call entries and then press **Delete**. The entry is deleted from the list.

Call Details Dialog Box

The call log Details dialog box displays the following call information:

- **Type:** Displays the call type (incoming or outgoing) with an icon (see page 80) and text.
- **Date/Time:** Displays the date and time the call came in.
- **Name/Number:** Displays the name/number of the caller/called party. An icon indicates the current contact status if the entry corresponds to an account or a device. See page 80 for a description of the icons. For an account, the current composite status is displayed. For a device, the current DND status is displayed. If the entry does not correspond to an account or a device, the status is unknown. This status is simply a snapshot and does not update in real time.
- **Result:** Displays the call result, as discussed on page 84.
- **Call Steps:** Displays every step the call went through before it terminated. Each step indicates the date and time at which the step occurred, the action the step took (e.g., CONNECTED), and the telephone number of the other party involved (if applicable).

To view call details:

Select the entry from the call log and press Details.

To return or delete a call from the call log details dialog box:

1. Press **Call Log** on the endpoint display.
2. Select the entry, then press Details.
3. Select any of the following options:
   - **Call:** Opens the Call dialog box allowing you to place the call, leave a station message, or go directly to the voice mail system for the party you want to call.
   - **Delete:** Removes the entry from the call log.
   - **Close:** Closes the dialog box and returns to the call log.

ADDRESS BOOK VIEW

NOTE: You must use the Web Client to Synchronize your UC Address Book and to add, edit, and delete Groups.

The Address Book view is where you store and work with your contact information. The address book stores two types of contacts: static and linked. Linked contacts are associated with an account or device on the telephone system, and display a real-time status. Static contacts contain information about a person or company you manually added to the address book. Static contacts are not linked to an account or device and do not display status.

Contacts are displayed in a scrollable table under the columns, Name, Status, and Options. You can sort, filter, edit, call, check the status of, or simply view address book information.

Sorting Address Book Contacts

The Address Book table allows you to sort your contacts using the Name and Status column headings.

To sort Address Book contacts:

1. Press **Address Book** on the endpoint display. You can sort the address book by the following columns:
   - **Name:** Lists contacts as [Last Name, First Name].
   - **Status:** Displays current status information for the contact. The information displayed depends on the type of result as follows:
     - *Linked Account*: Displays the current status icon for the user.
     - *Linked Device*: Displays the current DND status for the device.

     NOTE: An additional column displays the icon to call a contact. This column cannot be sorted.
2. Press either of the column names to sort the contacts in the table. Pressing the same column name again sorts the data in the opposite direction (ascending/descending order).

Filtering Address Book Contacts

The tabs located at the bottom of the Address Book table allow you to filter contacts.

To filter the contact list:

1. Press **Address Book** on the display.
2. Filter the address book contacts, using either or both of the following methods:
   - Press the following tabs to filter a subset of your contacts:
     - **#**: Filters contacts to display only those names that start with non-alphabetic characters.
     - **ABC** through **YZ**: Filters contacts by the selected letter(s).
     - **ALL**: Displays all contacts in the address book.
   - Press the **Group** drop-down selection list to filter the address book by group.

To check contact status:

1. Press **Address Book** on the endpoint display.

NOTE: The Status column displays the real-time status for the contact. Simple contacts (contacts that are not linked to an account or device on the system) will not display a status.

Contacts linked to system accounts and devices can display one or more of the following icons:

Indicates that the status of the user is currently unknown. Press this icon to retrieve a snapshot of the status. The snapshot reverts back to an unknown state in approximately 30 seconds.

Indicates that a user is currently available.

Indicates that a user is currently unavailable.

Indicates that a user is currently on a call.

Indicates that the DND status for the device is currently unknown. This icon displays if the type-ahead results display a device that is not currently in your address book. Press this icon to retrieve the status. The snapshot reverts back to an unknown state in approximately 30 seconds. This icon can also appear when the node the device belongs to is down or when the connection between UC and the CT Gateway is down.

Indicates that the DND status for the device is currently OFF.

Indicates that the DND status for the device is currently ON.

Indicates that the device is currently on a call.

Indicates a call log entry that is neither a device nor account. The presence of this icon does not necessarily indicate that the given name/number corresponds to an entry in your address book.

Indicates a simple company contact.

2. Check the Status column for text information about the current account or device status.

To add a simple contact to your address book:

1. Press **Address Book** on the endpoint display. (The list appears empty if no contacts have been added.)
2. Press **Add Contact**.
3. Enter the following information for this contact:
   - **Name** (see page 91)
   - **Work** (see page 91)
   - **Home** (see page 92)
4. Press **OK**. The information is saved for your address book, only and the newly added simple contact appears in the address book.

   NOTE: Filling out only the Work tab Company field results in adding a simple company contact. The icon changes from a simple contact icon to this icon .

5. Repeat steps 2 - 4 to add more simple contacts.

NOTE: You can add your system's voice mail extension as a contact and add it to your speed-dial buttons for quick access to voice mail.

Adding a Linked Contact

A linked contact is connected to a UC account or device in the system. Like simple contacts, linked contacts also store contact information. Unlike simple contacts, linked contacts also display real-time status information for the account or device to which they are linked.

To add a linked contact, either use the type-ahead search (see page 73) or the call log main screen (see page 83).

To add a linked contact:

1. Press **Unified Communicator** on the interface, then press **Search**.
2. Enter the first few characters of the contact using the Input Panel. (You can also enter the entire contact name or device extension.)
3. If there are too many results, enter additional characters to refine the search. The search results include all matching contacts in your address book, all matching users, and all matching devices in the system. The search function automatically tries to eliminate duplicate results from the list. If the search matches an account, as well as one or more devices owned by the account, then the search results will only display the matching account.

   NOTE: To select a range of items, activate the Input Panel (see page 13). Select the first item in your list, press the SHIFT key on the Input Panel, then select the last item in the list. You can also select one item, then press the CTRL key and select additional items.

4. Press **Add to Address Book**. The selected items are added as linked accounts and linked devices respectively.

   NOTE: Selecting the **Add to Speed Dial** button adds the result to the speed-dial list and to the address book.

5. Repeat steps 1-4 to add additional linked contacts.

To delete a contact from your address book:

1. Press **Address Book** on the interface. The address book with your contact information appears.
2. Select a contact and press **Delete**. See the note following step 3. for information on how to select a range of items.

   NOTE: Removing a contact from the address book also removes it from the speed-dial list.

To access and edit address book contact information:

1. Press **Address Book** on the interface. The Address Book view appears.
2. Press the contact you want to edit, then press **Edit**. You can also double-press the contact to enter edit mode.

NOTE: This panel provides full access to all of the contact information as it appears in the database. To edit your personal information, use the Web Client from your PC.

3. Change the information in the following tabs:
   - **Name:** Includes the following fields:
     - *First, Middle, and Last* (64-character limit)
     - *E-mail addresses:* Displays a list of all the contact's e-mail addresses (256-character limit).

NOTE: Press **Add** to add an e-mail entry to the list. Select an entry and press **Edit** to change an entry in the list, or press **Delete** to remove the entry from the list. Selecting an entry and pressing **Make Primary** will move that entry to the top of the list and make it the primary E-mail address. Some contact managers such as Microsoft Outlook® distinguish between the primary and secondary E-mail addresses.

     - *Notes:* Allows you to add comments for the contact (4096-character limit).
     - *Make contact private:* Select this option to mark the selected contact as private. Private contacts are only visible in your address book. They are not visible to other users or administrators.
   - **Work:** Includes the following fields:
     - *Company* (64-character limit)
     - *Title* (64-character limit)
     - *Department* (64-character limit)
     - *Work Street Address* (64-character limit)
     - *Work Primary Phone* (64-character limit)
     - *Work Secondary Phone* (64-character limit
     - *Work Mobile Number* (64-character limit)
     - *Work Fax Number* (64-character limit)
     - *Work IP Phone* (64-character limit)
     - *Work Pager Number* (64-character limit)
     - *Work Pager Number* (64-character limit)
     - *Work Web Page* (2048-character limit)

NOTE: Include http:// in the **Work Web Page** address.

- **Home:** Includes the following fields:
  - *Home Street Address* (64-character limit)
  - *Home Primary Phone* (64-character limit)
  - *Home Secondary Phone* (64-character limit)
  - *Home Mobile Number* (64-character limit)
  - *Home Fax Number* (64-character limit)
  - *Home Pager Number* (64-character limit)
  - *Home IP Phone* (64-character limit)
  - *Home Web Page* (2048-character limit)

NOTE: Include http:// in the **Home Web Page** address.

4. Press **OK**.

To place a call from the Address Book view:

1. Press **Address Book** on the interface.
2. Press the icon next to a contact to open a place call dialog box listing the telephone numbers for the contact. This icon does not appear if no numbers exist (i.e., the number field was left blank). Select from any of the following options:
   - Press one of the numbers in the list to initiate a call to that number.
   - Press **Find Me** to place a call to the account's primary device, allowing the account's call routing rules to route the call to the appropriate location. This option is only available if the contact is linked to an account, and the account has at least one device associated with it.
   - If the contact is linked to an account with at least one device, or if the contact is linked to a device, there will be two additional options in the popup menu: Voicemail and Leave Message. Press **Voicemail** to call the voice mail of the given person/device. Press **Leave Message** to leave a station message for the given person/device. If you leave a station message, the station message is left at the current location, or it is left at the primary device if the current location is not a UC device.

CALL ROUTING VIEW

NOTE: You must use the Web Client to set up your **Call Routing** rules and to create **Greetings**.

The Call Routing view allows you to view and enable or disable the call routing rules you created on your PC desktop using the UC Web Client. To enable call routing, select the **Enable call routing** option under the displayed call routing rules.

To view call routing rules:

1. Press **Call Routing** on the endpoint display. The list of call routing rules appears.
2. *To expand a rule and view rule steps:* Press the + sign next to the rule.

   To enable or disable a rule: Press the icon next to the rule. A green-filled radio button ( ) indicates an enabled rule. A red-filled square button ( ) indicates a disabled rule. Press the icon in this column to enable/disable the individual rule.

The client application has an option to display alerts for new messages, status changes, and incoming calls while logged in to UC. This option is set on the Behavior tab of the Options dialog box (see page 34). An alert consists of a small window containing information, and sometimes buttons, which appears on the screen and allows you to perform a related action. The alert remains on the screen for a few seconds, and then scrolls off the screen and disappears. If you want to close the alert window immediately, press the "X" in the upper-right corner of the alert window.

NOTE: You will only receive alerts while your endpoint is logged on to UC.

Receiving New Message Alerts

This alert appears when you receive a new station or voice mail message on any of your devices in your UC account. This alert indicates the message type received, which can be one of the following:

- **If it is a station message:** The alert indicates who left the message and includes a button you can press to place a return call to that person.
- **If it is a voice mail message:** The alert indicates the mailbox where the message was delivered and includes a button you can press to call the mailbox to retrieve the message.

Receiving Status Change Alerts

The Status Change alert appears any time a status of someone in your UC speed-dial list changes. The alert information differs as follows:

- *If the contact in your speed-dial list is a device:* The alert indicates the person whose status changed and the new DND status of the device.
- *If the contact in your speed-dial list is an account:* The alert indicates the person whose status changed and the account's new status description.

NOTE: The alert also includes a button you can press to place a call to the person whose status has changed.

Receiving Incoming Call Alerts

The Incoming Call alert appears any time your endpoint receives an incoming call. The alert indicates the caller ID (if available) and includes buttons you can press to answer the call or to send the call to the voice mail of your primary device. You can configure your primary device on the Devices view of the Web Client on your PC.

NOTE: UC searches your address book for a match in addition to using Caller ID information to determine the true identity of the caller.

Using E-Mail Reader

SECTION CONTENTS PAGE

Introduction 96
E-Mail Reader Features 97
Using Your Advanced Mailbox 98
Setting Up Your E-Mail Password 99
Accessing E-Mail Messages 101
Using Main Menu E-Mail Reader Count 103
Accessing Fax Messages 104
Recovering Deleted Messages 105
Changing Message Envelopes 106
Voice Mail Flowchart (Advanced Mailbox). 107

INTRODUCTION

Enterprise Messaging (EM) is the voice processing system that provides advanced messaging features with the E-mail Reader feature. This section provides information and instructions about advanced mailbox tasks for users who have E-Mail Reader enabled for their mailbox.

If your mailbox does not have E-Mail Reader enabled, you have a standard voice mailbox (see page 16). The instructions for many voice mail tasks are identical for standard voice mailbox and advanced mailbox users, therefore, the instructions for these common mailbox tasks are not repeated in this section.

See the following pages for common mailbox tasks:

- Initializing your mailbox (see page 24)
- Recording your personal greetings (see page 25)
- Recording your voice mail directory name (see page 26)
- Accessing your mailbox (see page 27)
- Disabling and enabling ASR (see page 28)
- Accessing voice mail messages (see page 50)
- Recording and sending voice mail messages (see page 53)
- Canceling unheard voice mail messages (see page 55)
- Changing your mailbox password (see page 60)
- Changing the call screening transfer method (see page 62)
- Programming a fax destination (see page 63)
- Changing the message search order (see page 63)
- Programming remote messaging (see page 64)
- Screening calls (see page 66)
- Using the voice mail directory (see page 67)

NOTE: For a voice mail flowchart for standard mailbox users, see page 123.

E-MAIL READER FEATURES

When E-Mail Reader has been enabled for your mailbox, you have the advanced mailbox. The advanced mailbox unifies your local voice mail messages and your remote fax and e-mail messages in one convenient location. E-mail Reader uses Text-to-Speech (TTS) capabilities to convert the text in an e-mail message to a **.wav** file. If E-Mail Reader is enabled for your mailbox, you can access voice mail, e-mail, and fax messages in your mailbox using your endpoint.

When you access an e-mail message in your mailbox, E-Mail Reader first announces your e-mail according to the envelope options that you set (see page 106). Then, after the envelope is played, E-Mail Reader reads the text in the body of the message. Once you have listened to your e-mail, you can access additional options to reply, forward, save, or delete the message (see page 101).

When you access a fax message, E-Mail Reader announces the fax envelope according to the envelope options that you set (see page 106). Because a fax message is received by your e-mail account as an attachment to an e-mail message in the form of a **.tiff** file, E-Mail Reader cannot read the text in the body of the fax. To view the fax and read it, you must access it from your e-mail account. With your advanced mailbox you can save, delete, and forward a fax (to another fax machine) using the available menu options, when prompted (see page 104).

USING YOUR ADVANCED MAILBOX

After you set up your mailbox (see page 24), you can use personal or system greetings to let callers know if you are out of town, on a call, etc. You can send messages to individuals and to a group of people if your voice mail administrator has programmed a name for the group. In addition, various options allow you to customize your mailbox, manage your messages, and screen your calls. To allow the system to retrieve e-mail and fax messages from your e-mail account, you must first set up your e-mail password (see page 99).

When you access your mailbox (see page 27), the system announces how many new and saved voice mail, fax, and e-mail messages you have in your mailbox. You can choose which type of message you want to access by selecting voice mail, fax, or e-mail from the main subscriber menu.

Main menu options include the following:

- **To access voice mail messages:** Say "Voice Mail" or press 1.
- **To record voice mail messages:** Say "Record" or press 2.
- **To access e-mail messages:** Say "E-Mail or press 3.
- **To access personal mailbox options:** Say "Personal" or press 4.
- **To access message options:** Say "Options" or press 5.
- **To access facsimile messages:** Say "Facsimile" or press 6.
- **To disable ASR (for that call only):** Say "Disable" or press 8.

At any menu level, you can say "Cancel" or press * to cancel or return to the previous menu or say "Accept" or press # to accept. For a voice mail flowchart for advanced mailbox users, see page 107.

NOTE: All of the menu options and instructions for using the advanced mailbox are presented as voice commands and numeric entries.

SETTING UP YOUR E-MAIL PASSWORD

When E-Mail Reader is enabled for your mailbox, the EM system prompts you to enter your e-mail password after you or your voice mail administrator does one of the following:

- Set up your mailbox (see page 24)
- Change your e-mail password for your e-mail client

To access your e-mail and fax messages from your advanced mailbox, you must set up your e-mail password. While completing the setup, you cannot use Automatic Speech Recognition (ASR) if it is enabled for your voice mail system. To prevent others from overhearing your password, you must use the dialpad buttons on your endpoint to set up your e-mail password.

When setting up your password, the number of times you press a button determines which character is entered, as shown in the table on the following page. Notice that the capital letters and lower case letters require different button presses. As you press the buttons, the system announces the current character. For security reasons, use the handset and not the speakerphone when you set up your e-mail password.

E-mail passwords are case-sensitive and your entry must match your e-mail password exactly. Also, your e-mail password cannot include any characters that are not included in the table on the following page and cannot exceed 40 characters. Check with your administrator if you encounter any difficulties setting up your e-mail password.

To enter your e-mail password:

NOTE: To repeat menu instructions, say "Help" or press 0 at any time.

ALSO: If you enter an incorrect password, or if you choose to skip setting a new E-Mail Reader password, the Main Menu E-Mail Reader Count option (see page 103) is automatically disabled to prevent having to hear the invalid password prompt for each subsequent login and to protect against being locked out from your e-mail account.

1. Access your mailbox as described on page 27. The system announces that it was unable to retrieve your e-mail and fax messages, and gives you the following options:
   - Say "Continue" or press # to access your mailbox without access to your e-mail messages.
   - Say "Password" or press 1 to enter your new e-mail password.
2. When prompted, enter your e-mail password using the dialpad buttons, and then press #. (Refer to the table below for dialpad button descriptions.)

   NOTE: For a description of special character locations, press 2.

3. Your new password is played. You have the following options:
   - Say "Accept" or press # to accept the password.
   - Say "Re-enter" or press 3 to erase and re-enter the password.

	NUMBER OF TIMES BUTTON IS PRESSED								
BUTTON	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**
1	1	-	&	(	)	_	space*		
2	a	b	c	2	‘	A	B	C	
3	d	e	f	3	!	D	E	F	
4	g	h	i	4	*	G	H	I	
5	j	k	l	5	#	J	K	L	
6	m	n	o	6	M	N	O		
7	p	q	r	s	7	P	Q	R	S
8	t	u	v	8	?	T	U	V	
9	w	x	y	z	9	W	X	Y	Z
0	0	@	:	.	,	/	+		

*Press 1 seven times for a blank space.

ACCESSING E-MAIL MESSAGES

NOTE: By default, the message lamp on your endpoint lights when you receive a new voice mail message. Although the lamp can be programmed for other functions, it cannot be programmed to indicate that you have received a new e-mail message.

E-Mail Reader does not distinguish between conventional e-mail messages and meeting invitations and responses. Therefore, e-mail messages and meeting messages (including invitations, cancellations, and responses) can all be accessed by selecting option three from the main menu.

When you access your e-mail messages, E-Mail Reader first announces the message according to the envelope options you select (see page 106). Then E-Mail Reader reads the text in the body of the message. After you access your message you can replay the message, listen to the next or previous message, replay the message envelope, save the message, or delete the message. In addition, you can reply to the message or forward a copy to another recipient.

When you select the reply option, you are prompted to record a message and your reply is sent as an attachment in the form of a **`.wav`** file. If the e-mail has multiple recipients, you have the option of replying to just the sender, or to all of the recipients. When you forward an e-mail message, the e-mail is converted to a fax and forwarded to the fax destination telephone number you specify.

NOTE: The body of Outlook meeting messages contain links that E-Mail Reader interprets as text. These links are displayed if you are using a third-party mail application or Outlook Express, but they are hidden in Outlook.

EXAMPLE: Sally User's supervisor creates a Sales Team meeting invitation in Outlook and sends it to Sally. Sally accepts the meeting and in the body of her acceptance e-mail she writes, "I'm looking forward to attending." When Sally's supervisor access Sally's meeting acceptance using E-Mail Reader, the e-mail is announced according to the supervisor's e-mail envelope preferences. Then E-Mail Reader reads Sally's written response followed by the hidden link inserted by Outlook, "I'm looking forward to attending. Microsoft Outlook Web Access: http://TMS-NT-EVS01/Exchange/Sally_User/Inbox/Accepted%3A%20Sales%20Team%20Meeting-5.EML."

To access your e-mail with E-Mail Reader:

NOTE: To repeat menu instructions, say "Help" or press 0 at any time.

1. Access your mailbox as described on page 27.
2. Say "E-Mail" or press 3 to listen to your e-mail messages. Then select one of the following:
   - Say "New" or press 1 to listen to new messages.
   - Say "Saved" or press 3 to listen to saved messages.

   NOTE: You may experience a delay if you have a large number of e-mail messages in your in-box (for example, more than 500 messages).
3. After the e-mail envelope is played, E-Mail Reader reads the body text of the e-mail message. While you are listening to a message, you can use the following options:
   - Say "Skip" or press # to skip to the end of the recording.
   - Say "Back up" or press 1 to "rewind" a few seconds and replay the message.
   - Say "Pause" or press 2 to pause. Say "Continue" or press # to continue.
   - Say "Forward" or press 3 to skip ahead.
   - Say "Lower" or press 4 to lower the volume.
   - Say "Envelope" or press 5 to play the message envelope.
   - Say "Higher" or press 6 to raise the volume.
   - Say "Delete Message" or press 9 to delete the message.
   - Say "Cancel" or press * to return to the previous menu.
4. When E-Mail Reader has finished reading the e-mail you have the following options:
   - Say "Replay" or press 1 to replay the message from the beginning.
   - Say "Reply" or press 2 to reply to the message. If the e-mail message had more than one recipient, you have the following options:
     – Say "Everyone" or press 1 to reply to all recipients.
     – Say "Sender" or press 2 to reply to the sender.
     – Say "Hear" or press 3 to hear all recipients.
   - Say "Forward" or press 3 to forward a copy of the message to a fax destination. Then say or enter the fax destination number. The system plays the fax destination number. Select one of the following:
     – Say "Yes" or press # to verify the number. The system announces that the fax is scheduled for delivery.
     – Say "No" or press * to start over.

NOTE: You cannot forward an e-mail message to a mailbox or group list. When you forward an e-mail message, the e-mail is converted to a fax and forwarded to the fax destination telephone number that you specify.

- Say "Previous" or press 4 to listen to the previous message.
- Say "Envelope" or press 5 to play the introductory message envelope (see page 106 for programming instructions).
- Say "Next" or press 6 to listen to the next message.
- Say "Save" or press 7 to save the message.
- Say "Delete Message" or press 9 to delete the message.

NOTE: You may be prompted to confirm deleting the message. Say "Yes" to delete the message or "No" to cancel the request to delete the message.

5. Hang up.

USING MAIN MENU E-MAIL READER COUNT

After you set up your E-Mail Reader account, the system announces the number of voice mail, e-mail, and fax messages you have each time you access your mailbox before you can listen to your messages. The voice prompt that indicates the number of **e-mail** and **fax** messages is the "Main Menu E-Mail Reader Count" option. (Voice mail message prompts are not included in Main Menu E-Mail Reader Count and will always be played when you access your mailbox.)

You can disable the Main Menu E-Mail Reader Count option in your mailbox. Disabling the Main Menu E-Mail Reader Count option defers e-mail and fax prompts **until** you select the E-Mail or Fax message option from the main menu. Disabling Main Menu E-Mail Reader Count does not disable E-Mail Reader. It only defers the voice prompts until the appropriate option is selected.

To disable or enable the Main Menu E-Mail Reader Count option:

1. Access your mailbox as described on page 27.
2. Say "Personal" or press 4 to select the Personal Options menu.
3. Say "More" or press 9 to select More Options.
4. Say "E-Mail Reader Count" or press 4 to select the E-Mail Reader Count toggle option.
5. *If E-Mail Reader Count is **enabled***, say "Disable" or press 1 to disable.
   *If E-Mail Reader Count is **disabled***, say "Enable" or press 1 to enable.

ACCESSING FAX MESSAGES

NOTE: By default, the message lamp lights when you receive a new voice mail message. Although the lamp can be programmed for other functions, it cannot be programmed to indicate that you have received a new fax message.

When you access a fax message using option six on the main menu, E-Mail Reader announces the fax message according to the envelope options that you selected (see page 106). E-Mail Reader does not have the capability to read the text in a fax. You can, however, save, delete, and forward a fax (to the fax number that you specify) using the associated options.

To access fax messages and the associated options:

1. Access your mailbox as described on page 27.
2. Say "Facsimile" or press 6 to access your fax messages. Then select one of the following:
   - Say "New" or press 1 to listen to new messages.
   - Say "Saved" or press 3 to listen to saved messages.
3. After the fax envelope is played, you have the following options:
   - Say "Forward" or press 3 to forward a copy of the message to another destination. Then say or enter the fax destination number. The system plays the fax destination number. Select one of the following:
     – Say "Yes" or press # to verify the number. The system announces that the fax is scheduled for delivery.
     – Say "No" or press * to start over.
   - Say "Previous" or press 4 to listen to the previous message.
   - Say "Envelope" or press 5 to play the introductory message envelope (see page 106 for programming instructions).
   - Say "Next" or press 6 to listen to the next message.
   - Say "Save" or press 7 to save the message.
   - Say "Delete Message" or press 9 to delete the message.

   NOTE: You may be prompted to confirm deleting the message. Say "Yes" to delete the message or "No" to cancel the request to delete the message.
4. Hang up.

RECOVERING DELETED MESSAGES

Recovering deleted messages varies based on media type. If you delete a voice mail message, you can retrieve it within a specific time frame (up to 24 hours, programmed by your voice mail administrator). The specified time frame for retrieving deleted e-mail and fax messages is determined by the Exchange administrator. Once you recover a deleted message, it is then restored to your saved-message queue. Deleted voice mail, e-mail, and fax messages that are not recovered within the specified time frames are automatically erased.

NOTE: Contact your system administrator if you want to know how long you have to recover deleted messages.

To recover deleted messages:

1. Access your mailbox as described on page 27.
2. Say "Options" or press 5 for Message Options.
3. Say "Recover" or press 2 to access undelete options.
4. Specify which media type you would like to recover. Your options are:
   - Say "Voice Mail" or press 1 to recover a voice mail message.
   - Say "E-Mail" or press 2 to recover an e-mail message.
   - Say "Facsimile" or press 3 to recover a fax message.
5. *EITHER,* Say "Listen" or press 1 to listen to your deleted messages and choose which ones to recover. After each message you can:
   - Say "Replay" or press 1 to replay the message.
   - Say "Reply" or press 2 to reply to the message.
   - Say "Forward" or press 3 to forward the message.
   - Say "Previous' or press 4 to listen to the previous message.
   - Say "Envelope" or press 5 to play the message envelope.
   - Say "Next" or press 6 to listen to the next message.
   - Say "Recover" or press 7 to recover the message.

   OR, say "Recover" or press 2 to recover all deleted messages.

   OR, Say "Purge" or press 3 to **permanently** delete all deleted messages.
6. Hang up.

CHANGING MESSAGE ENVELOPES

When you receive a voice, fax, or e-mail message, a message "envelope" is played. The envelope can include the time and date the message was left, the source of the message, and additional information that is associated with the media type. Common envelope options for voice mail, e-mail, and fax include:

- **Time and Date:** The time and date the message was received.
- **Source:** The source of the voice, e-mail, or fax message.

These envelope options vary by media type:

- **Length:** The recorded time, in minutes, for **voice messages**.
- **Subject:** The text in the subject field for **e-mail** messages.
- **Pages:** The number of pages included in the **fax** attachment.

By default, all of the envelope options are enabled for each type of message. However, you can change your envelope options, as described below.

To change and save your message envelope:

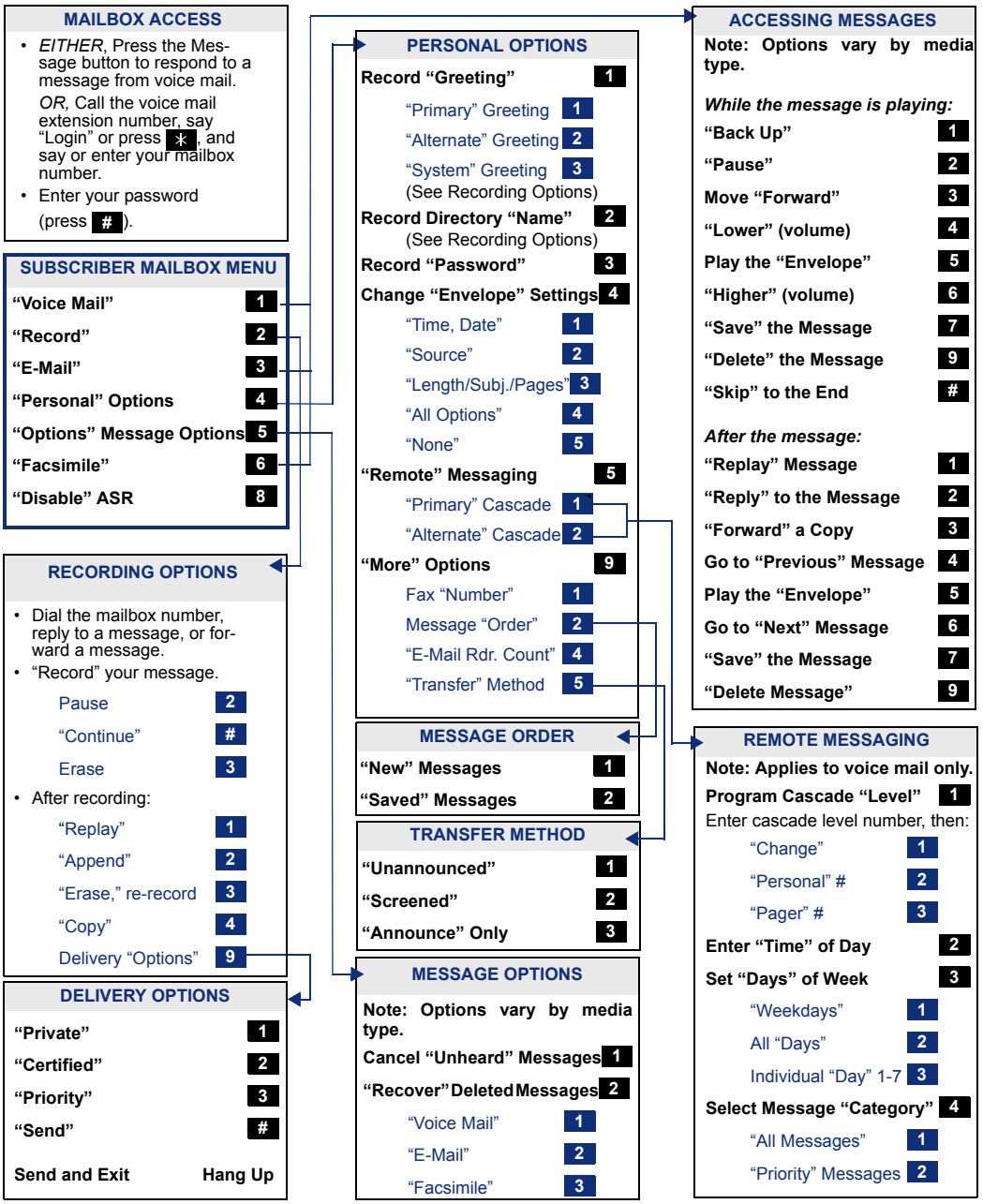
1. Access your mailbox as described on page 27.
2. Say "Personal" or press 4 to select the Personal Options Menu.
3. Say "Envelope" or press 4 to select the Message Envelope Options Menu.
4. Select the media type you would like to change:
   - Say "Voice Mail" or press 1.
   - Say "E-Mail" or press 2.
   - Say "Facsimile" or press 3.
5. You can then do any of the following:
   - Say "Time, Date" or press 1 to enable or disable the time and date options.
   - Say "Source" or press 2 to enable or disable the message source option.
   - *For voice mail,* say "Length" or press 3 to enable or disable the message length option.

     For e-mail, say "Subject" or press 3 to enable or disable the subject option.

     For faxes, say "Pages" or press 3 to enable or disable the pages option.
   - Say "All Options" or press 4 to enable all options and return to the Personal Options Menu.
   - Say "None" or press 5 to disable the entire envelope and return to the Personal Options Menu.
   - Say "Accept" or press # to accept the changes.
   - Say "Cancel" or press * to return to the Personal Options Menu.
6. Hang up.

VOICE MAIL FLOWCHART (ADVANCED MAILBOX)

NOTE: In most menus, you can say "Cancel" or press * to return to the previous menu. Say "Accept" or press # to accept the option.



Learning More

SECTION CONTENTS PAGE

Introduction 110
What the Administrators Can Do for You 110
Frequently Asked Questions (FAQs) 111
Default Feature Codes 114

INTRODUCTION

If you want to know more about your endpoint and voice mail system, this is the section for you. With additional information and FAQs, you should be able to find answers to most of your questions.

NOTE: Because the telephone system is very flexible and programmable, the procedures for using the features might vary slightly from the descriptions in this guide. If so, your trainer or system administrator can tell you how your system differs and how to use the features.

WHAT THE ADMINISTRATORS CAN DO FOR YOU

The administrators are the people to whom you should turn if you have any problems with your endpoint and/or voice mail. They have access to advanced programming features and can reset certain settings associated with your endpoint.

The types of administrators that can help you with your endpoint/voice mail are as follows:

- **System Administrator:** Performs certain telephone system functions, including:
  - Setting the date and time
  - Programming System Speed-Dial numbers
  - Making database changes, such as programming usernames, toll restriction, DND messages, and extension numbers
- **Voice Mail Administrator:** Performs tasks associated with the voice mail system, including:
  - Recording a broadcast message that is sent to all mailboxes at once
  - Performing mailbox maintenance (such as changing your password)
  - Customizing voice mail prompts

NOTE: For problems that are network-related, contact your network administrator.

If you are a system administrator or if you need additional information not available in this guide, refer to either your system's administrator guide, or the *Model 8690 Administrator's Guide* (part no. 550.8120). If you are a network administrator, refer to the latest version of the *IP Devices Installation Manual* (part number 835.2195).

FREQUENTLY ASKED QUESTIONS (FAQS)

This section includes some of the most frequently asked questions. If you have problems with your endpoint or voice mailbox, refer to this section before you contact the appropriate administrator or your local Inter-Tel provider.

Q1. *How can I retrieve messages if I do not know the password for my voice mail?*

A1. Try using your extension number, which is your default password. Or, maybe you do not have a password, in which case pressing # is all you need to do. If these options don't work, contact your voice mail administrator, who can change or erase the password for you. You can then retrieve your messages and reset the password, if desired (see page 60).

Q2. *How can I set the number of rings that are allowed before the call is sent to voice mail?*

A2. Only your system administrator can change the number of rings that are allowed before the call is forwarded to voice mail.

Q3. *Why can't I retrieve deleted messages?*

A3. Voice mail may have erased your message. After a programmed amount of time has lapsed, up to 24 hours, voice mail automatically erases all deleted messages (see page 52). If you attempted to undelete a voice mail message within this time frame but you were still unsuccessful, your voice mail system may not have sufficient space programmed to store deleted messages.

Q4. *How can I change the name displayed on my endpoint?*

A4. Only your system administrator can change the usernames assigned to extensions.

Q5. *Why don't the local telephone company star codes (i.e.*82, *69, etc.) work when I press the* **Outgoing** *button to call an outside number?*

A5. Rather than pressing the **Outgoing** button or 8 to access an outside line, you must dial a Select Line Group number before you can use the star codes. For example, if your system is using the default Select Line Group numbers, dial 92001 to access that line. Once you have dial tone, you can dial the star code and the number.

Q6. *What happened to the skin and custom ring I saved?*

A6. The preferences that you save, like skin and custom ring, are only used when the endpoint is in the state (logged on or off UC) that it was in when you set these preferences. The Model 8690 endpoint allows you to save two sets of preferences that are stored locally on the endpoint. For example, if you log into UC and save a custom ring and skin to use with your UC account, the skin and custom ring will only be available when you are logged in to UC.

Q7. *Can I store applications and data on my endpoint?*

A7. The Mounted Volume folder is the only location on the endpoint where data and files persist across power loss and resets. Although you can store a small amount of data on the endpoint, it is strongly suggested that you store applications and data on an accessible storage device such as a Compact Flash memory card or your desktop PC.

Q8. *Why do the views change when my endpoint is logged on to UC and there is call activity on my endpoint?*

A8. When you are logged on to UC, the Model 8690 automatically displays the most appropriate view based on the current activity. For example, if your endpoint is logged on to UC and the dialpad and display are showing, an incoming call will trigger UC to display the Call List view. The Call List view allows you to see who is currently calling, and also allows you to use the Call Control buttons to take action on the call. When the call is no longer active, the original view is restored.

Q9. *When I set my preferences using the Options dialog box, I opted to use large icons. Because the large icons and text take up so much area in the tables that display the information, how can I see all of the information that is displayed?*

A9. The large fonts option (see page 34*)* increases the size of the text and icons when the information is presented in a table format such as the Address Book view, Call List view, etc. However, the overall size of the table remains the same whether you use large fonts or not. Therefore, large fonts will take up more table area and reduce the amount of information that you can view in the table at one time. To view additional information when using large fonts, you can scroll to the information using the vertical and horizontal scroll bars. If you notice that some of the information is cut off, you can resize the column by moving the column bar in the heading to the right or the left.

Q10. *Why can't I use ASR to enter my e-mail password?*

A10. To prevent others from overhearing your password, you must enter it using the dialpad buttons on your endpoint. See page 99 for additional information about entering your e-mail password if E-Mail Reader is enabled for your mailbox.

Q11. *If my e-mail password expires for my e-mail client and I have to change it, do I also have to update it for my mailbox?*

A11. Yes. Whenever you change your e-mail password, you will be prompted to update it for E-Mail Reader. See page 99 for additional information about entering your e-mail password.

Q12. *Why don't I have e-mail and fax messages in my mailbox?*

A12. If your mailbox is the standard voice mailbox (see page 16), you will not receive e-mail and fax messages in your mailbox. To receive these types of messages, E-Mail Reader must be enabled for your mailbox. Check with your voice mail administrator to see if E-Mail Reader is enabled for your mailbox.

Q13. *Why do I get the wrong response when I try to complete a task by saying a command?*

A13. Several things affect the system's response to voice commands. One reason the system may not be responding to voice commands is that Automatic Speech Recognition (ASR) may not be enabled on your system. If your system's voice prompts do not include the option to "say" a command, then ASR is not enabled. See page 18 for additional guidelines for using ASR.

Q14. *Why can't I use one of the features described in this guide?*

A14. There are a few reasons why you might not be able to access the feature. Some possible reasons include:

- Your system software version may not support the feature. Check with your system administrator to see which software version your telephone system currently uses and if there are any features restrictions for your system.
- Your system administrator may not have enabled the feature for your endpoint.
- Your system administrator may have programmed your endpoint to block the feature.

Q15. *If I need further assistance, how do I get technical support?*

A15. First, contact the appropriate administrator (system, voice mail, or network) if you have a question that is not covered in this user guide. If you need further assistance, contact your local authorized Inter-Tel provider. Providers can be located using the Inter-Tel Web site at www.inter-tel.com. All Inter-Tel sales, service, and support are handled at the local level.

DEFAULT FEATURE CODES

Use the blank spaces below to enter custom feature codes, if necessary.

OUTSIDE LINE ACCESS CODES

ACCESS CODE NAME	ACCESS CODE	NEW CODE
Select Line Group 1-208	92001-92208*	
Automatic Route Selection	92000*	
Emergency Call	911 (999 in Europe)	
Outgoing Call	8	

*These defaults may differ depending on the software version.

EXTENSION NUMBERS

EXTENSION NAME	EXTENSION NUMBER	NEW NUMBER
Endpoint Extensions	1000-1999	
Hunt Groups	2000-2299	
Attendant	0	

GENERAL FEATURE CODES

FEATURE NAME	FEATURE CODE	NEW CODE
Answer (Ringing Call)	351	
Call Forward All Calls	355	
Conference	5	
Display IP Address	300	
Do-Not-Disturb	370	
Do-Not-Disturb Cancel	371	
Do-Not-Disturb On/Off	372	
Group Listen	312	
Headset On	315	
Headset Off	316	
Headset On/Off	317	
Hold – Individual	336	
*Message	365	
Microphone Mute On/Off	314	
Redial	380	
Redirect Call	331	
Reverse Transfer (Call Pick-Up)	4	
Ring Tone Selection	398	
Show IP Address	300	
Transfer To Ring	345	

* You can retrieve messages, but you cannot send them (see page 23).

NOTES

Index

A

Abbreviations 9
About Tab 36
About This Guide 2
About Voice Mail 17
About Your Endpoint 3
Accessing
    e-mail messages 101
    fax messages 104
Accessing Address Book Contact Information 91
Accessing Your Mailbox 27
Account Icons 73
ActiveSync 4
Adding a Linked Contact 90
Adding Simple Contacts 89
Address Book
    accessing and editing 92
    contact information 92
    view 87
Address Book View 87, 92
Adjusting Your Endpoint's Viewing Angle 22
Administrators 110
Advanced Mailbox
    using 98
    voice mail flowchart 107
Advanced Options 37
Alternate Greeting 25
Answering Calls 45
Appearance Tab 34
Automatic Speech Recognition (ASR) 17
Available status 72

B

Behavior Tab 34
Buttons
    dialpad 7
    feature 7, 11
    menu 7
    message 23
    mute 46
    navigation 7
    special 8

C

Calibrating the Screen 30
Call Control Buttons 80
Call Details Dialog Box 86
Call Forwarding 48
Call List View 79
Call Log
    main screen 83
    view 83
Call Routing View 93
Call State 79
Call Waiting 45
Caller ID 79
Caller ID, Positive 79
Calls
    answering 45
    making 25
    making conference 46
    placing on hold 46
    receiving 25, 44
    returning to held caller 46
Canceling
    call forward request 48
Cascade Levels 64
Changing
    call screening transfer method 62
    e-mail password 100
    fax destination number 63
    message envelope 61
    message search order 63
    personal greeting 26
    transfer method 62
    voice mail message envelope 61
    voice mail password 60
    voice mail, e-mail, and fax message envelope 106
    volume levels 58
    Web Client options 71
    your status 72
Checking Contact's Status 88
Checking Messages 78
Compact Flash (CF) Port 4
Composite Status, Current 87
Conference Calls 46
Connecting a Headset 23
Contacts
    accessing and editing 92
    adding linked 90
    E-mail addresses 91
    information panel 91
    simple, adding 89
    telephone numbers 91
Creating a Conference Call 82
Current Status 72

D

Default Feature Codes 114
Defaults
- feature codes 114
- mailbox password 24

Deleting a Call Log Entry 85
Deleting a Linked Contact 90
Deleting Messages 78
Delivery Options 54
Device Icons 74
Dial Tone 20
Dial Tones 59
Dialpad Buttons 7
Disabling
- cascade levels 65
- DND 55
- group listen feature 22
- message envelope options 61
- time/date option 61

Disconnecting a Headset 23
Display 7
Do-Not-Disturb (DND) 55
Dropping a Party from a Conference 82
Dropping Out of a Conference 46

E

Editing Address Book Contact Information 91
E-Mail Messages 101
E-Mail Reader 17, 99
Emergency Calls 44
Enabling
- cascade levels 65
- do-not-disturb 55
- group listen feature 22

enabling and disabling 103
Ending a Conference 82
Endpoint 15
Endpoint Basics 22
Endpoint Configuration
- changing volume levels 58
- selecting a ring tone 59

Endpoint Connectors 4
Endpoint Idle 19, 31
Enterprise Messaging 17
Exiting a Conference 46
External Microphone Jack 4
External Speaker Jack 4

F

Favorites 76
Favorites Button 76
Fax Destination Number 63
Fax Messages 104
Feature Buttons 7, 8, 11
Feature Codes 114
Features
- Automatic Speech Recognition (ASR) 18
- call forwarding 48
- call waiting 45
- conference 46
- do-not-disturb 55
- E-Mail Reader 99
- group listen 22
- headset on/off 23
- hold 46
- mute 22
- redial 49
- redirect call 49
- skins 11
- transfer 47
- UC
  - address book 87
  - alerts 93
  - call control 80
  - call log 83
  - call routing 93
  - conference 82
  - feature code favorites 76
  - mute 81
  - navigation buttons 10
  - recording a call 81
  - redial 76
  - search 73
  - speed dial 77
  - transfer 81
  - views 10

Filtering Address Book Contacts 88
Flash Memory Conflict 21
Flowchart
- advanced mailbox 107
- standard voice mailbox 123

Forwarding Calls 48
Frequently Asked Questions (FAQs) 111
Full Mailbox 27

G

Greetings 25
Group Listen Using the Speaker 22
Guidelines for Using the Model 8690 Endpoint 15, 21

H

Handset Jack 3
Headset Jack 3
Hearing Aid-Compatible (HAC) Handset 3
Hold 46

I

Initializing Your Mailbox 24
Input Panel 13
Installing Software and Firmware Upgrades 40
Intercom Calls 43
Inter-Tel Protocol (ITP) Mode 2

J

Jacks
- LAN/PWR 4

L

LAN/PWR Jack 4
LCD (Liquid Crystal Display) 3
Linked Contact 90
- adding 90
- deleting 90
- editing 91

Liquid Crystal Display (LCD) 3
Listening to Messages 50

M

Mailbox Almost Full/Full 27
Main Menu E-Mail Reader Count 103
Making
- an emergency call 44
- calls 43

Making and Receiving Calls 25, 43
Manual Call Forwarding 48
Menu 9
Menu Buttons 7
Message
- button 23
- search order 63

Message Count and Type 27
Message Indicator Lamp 3, 5, 19
Messages
- recording and sending voice mail messages 53
- recovering deleted 105
- station 78
- system 78
- voice mail 78

Messaging, Remote 27, 64
Microphone 3, 46
Model 8690 (Photo) 3
Modes
- alphanumeric, numeric 19
- SIP 15

Mounted Volume Folder 21
Mute Button 22, 46
Muting a Call 81

N

Navigation Buttons 7, 10
Network Endpoint 15
Numeric Mode 19

O

Off-Hook 20
On-Hook 20
Operating System 12
Optional USB Devices 5
Outside Calls 44

P

Passport, .NET 37
PC Ports 4
Performing a Search 73
Personal Computer Memory Card International Association (PCMCIA) Port 4
Personal Data Assistant (PDA) 3
Placing
- a call 71
- calls on hold 46, 81
- conference calls 46
- intercom calls 43
- outside calls 44

Positive Caller ID 79
Power Requirements 6
Primary Greeting 25
Programming
- cascade levels 64
- date and time notification 65
- fax destination 63
- remote messaging 64

R

Receiving
- incoming call alerts 94
- intercom calls 44
- new message alerts 93
- outside calls 45
- status change alerts 94

Recording
- and sending voice mail messages 53
- personal greetings 25
- voice mail directory name 26

Recording a Call 81
Recovering Deleted Messages 52, 105
Redial 76
Redialing a Number 49, 76
Redirect Calls 49
Remote Messaging 27, 64
Reset Button 4, 6
Retrieving Messages 23
Returning a Call 85
Returning to a Call 46
Reverse Transfer 48
Ring Types 59
Running Feature Code Favorites 76

S

Saving Volume Levels 58
Screening Calls 66
Search Order 63
Selecting a Ring Tone 59
Sending Calls to Voice Mail 45
Sending Messages 53
Session Initiation Protocol (SIP) 15
Session Initiation Protocol (SIP) Mode 2
Setting
- backlight options 31
- options 33
- personal options 106
- remote messaging 64
- your e-mail password 99

Setting Backlight Options 31
Setting Preferences 58
Show Desktop Icon 12
Simple Contacts, Adding 89
SIP Mode 15
SIP-Enabled Application 15
SIP-Enabled Device 15
Six-Line Display 7
Skins 11
Software Compatibility 24
Sorting Address Book Contacts 87
Sorting the Call Log 85
Speakers 3
Speed-Dial
- button 77
- list 77

Standard Voice Mailbox Flowchart 123
Standard Web Client
- adding a linked contact 90
- address book 90
- filtering address book contacts 87, 88

Static Contact Icons 74
Station Password 39
Stylus 7
System
- memory and storage 13
- registry 14
- tray icon 10, 70
- tray menu 33

System Administrator 110

T

Taskbar 12
Telephone Interface 7
Temporary Composite Status 72
Temporary Status 72
Touch Screen Backlight 19, 31
Transfer Button 81
Transferring Calls 47, 81
Tray Client Icon 10
Type-Ahead Search 81

U

Unavailable Status 72
Unified Communicator
- elements 10
- views 10

Unified Communicator View 72
Universal Serial Bus (USB) Client 4
Universal Serial Bus (USB) Host 4
Using
- advanced mailbox 98
- defaults 24
- do-not-disturb mode 55
- headset 23
- message button 23
- mute feature 22
- system tray menu 32
- UC on your endpoint 71
- UC views 71

V

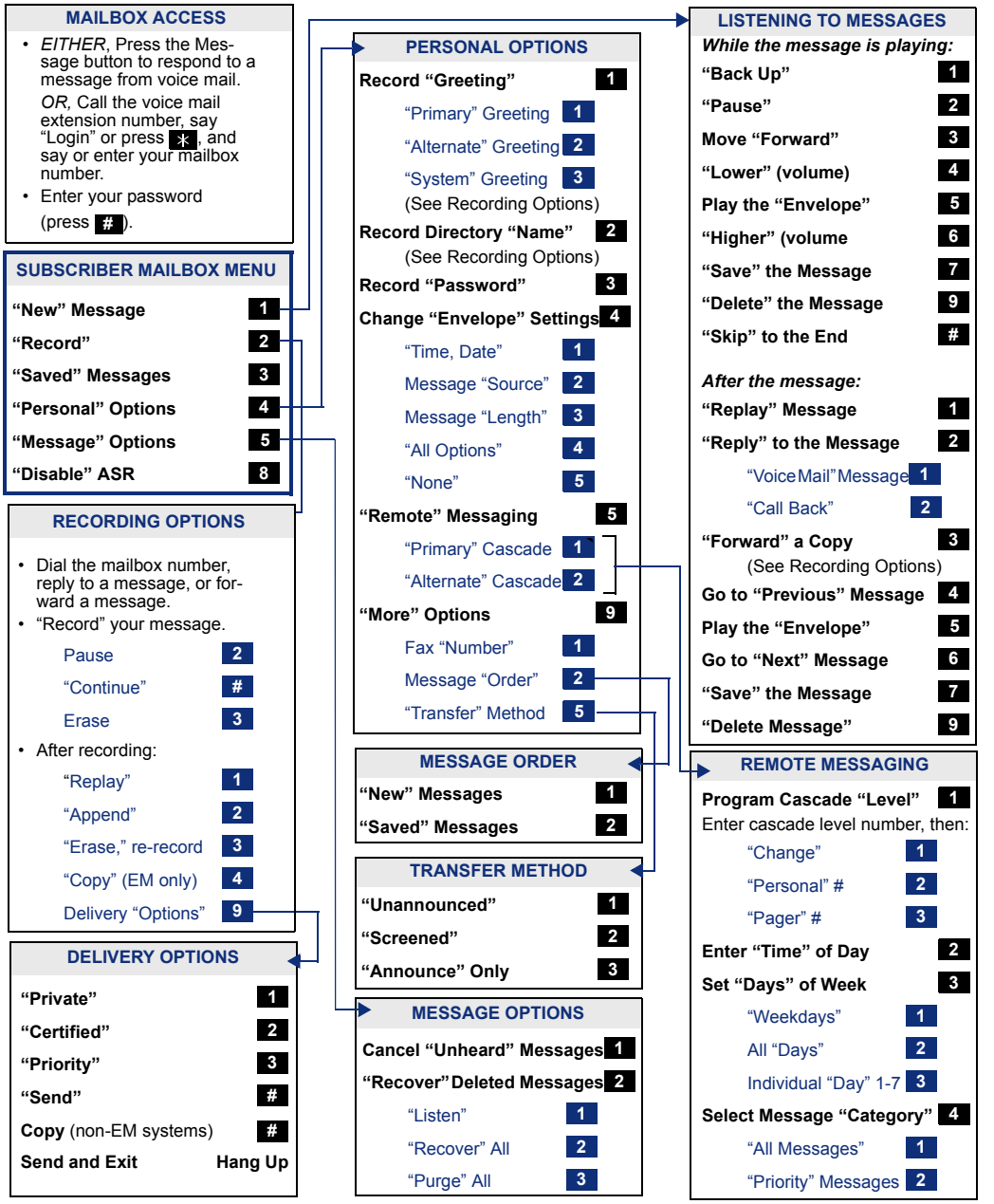
Viewing Call Details 86
Viewing Call Routing Rules 93
Virtual Local Area Network (VLAN) 32
VLAN ID 32
Voice Mail
    administrator 15
    messages
        listening to 50
Voice Mail Flowchart
    advanced mailbox 107
    standard mailbox 123
Voice Mail Messages
    recording and sending 53
    recovering deleted 52
Volume Levels 58

W

Wall Mounting 3
Web Client 70, 71
What the Administrators Can Do for You 110
Windows CE. NET 12
Working with the Speed-Dial List 77

VOICE MAIL FLOWCHART (STANDARD VOICE MAILBOX)

NOTE: At any menu level, you can say "Cancel" or press * to cancel or return to the previous menu or say "Accept" or press # to accept.



Part No. 550.8025
Issue 11, March 2006